



iConnectData (ICD) User Guide

Updated: 11/14/2019

The information furnished herein is proprietary and confidential and is intended only for iConnectData users. It should not be duplicated, published, or disclosed in whole or in part.

Table of Contents

- Overview 3
- Logging into iConnectData 4
- Retrieving your Login Information 7
 - Retrieving your Password 7
 - Retrieving your User ID 7
- Navigating the iConnectData Home Page 8
 - Navigate the Main Menu 8
 - Use the Resource Center 9
 - Manage your User Profile 9
 - Set Up QuickLinks 10
- Managing your Cards 12
 - Order a New Mastercard 12
 - Order a Ghost Mastercard 17
 - Order a New Proprietary Card 20
 - Search for Card Orders 24
 - Use Card Maintenance 27
 - Update Multiple Cards 39
 - Activate Cards 42
 - Manage Cardholder and Vehicle IDs 46
- Searching for an Invoice 53
- Accessing Quick Reports 55

Revision History

Version	Date	Editor	Modification
v01	20140426	Kristy Johnson	Original version created.
v02	20150330	Kristy Johnson and Steven Harris	Updated content and formatting.
v03	20180810	Steven Harris	Updated content and formatting, added new sections for card maintenance, invoices, and reporting.

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 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.

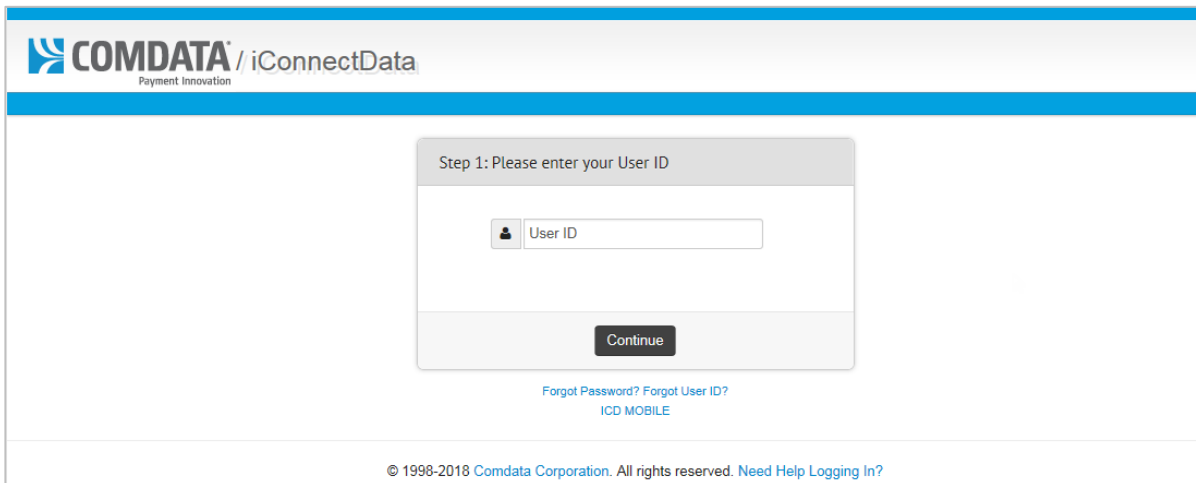
Logging into iConnectData

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.icconnectdata.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.

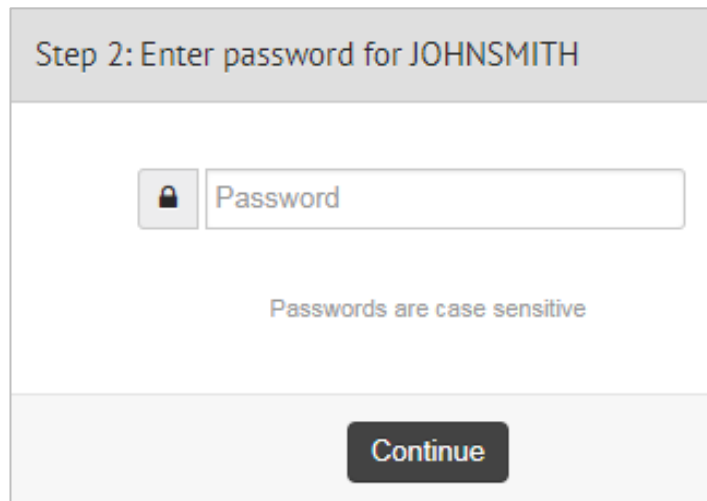


The screenshot shows the iConnectData login page. At the top left is the logo for COMDATA / iConnectData with the tagline "Payment Innovation". The main content area is titled "Step 1: Please enter your User ID". It features a text input field with a user icon and the placeholder text "User ID". Below the input field is a dark "Continue" button. At the bottom of the form, there are links for "Forgot Password?", "Forgot User ID?", and "ICD MOBILE". The footer contains the copyright notice: "© 1998-2018 Comdata Corporation. All rights reserved. Need Help Logging In?"

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.



The screenshot shows the second step of the login process, titled "Step 2: Enter password for JOHNSMITH". It features a text input field with a lock icon and the placeholder text "Password". Below the input field, it states "Passwords are case sensitive". At the bottom of the form is a dark "Continue" button.

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 Customer Service immediately!

Step 3: Please select an image.

Please select an ImageKey. This image will be associated with your account and will be shown each time you log into iConnectData, confirming that you are at the legitimate website.



Please enter an ImageKey caption that you will recognize next time you log in. This caption will be shown with your ImageKey each time you log into iConnectData, confirming you have reached the legitimate web site. If the caption shown when you login does not match what you entered here, do not enter your password. Please call our customer service, as you may be at a fraudulent site.



Continue

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.

Step 4: Please select three security questions

Please select your first security question

Answer

Please select your second security question

Answer

Please select your third security question

Answer

Continue

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 Customer Service for assistance.

Step 2: Enter password for JOHNSMITH

If this ImageKey and caption are correct, please enter your password to log into iConnectData.




Image Caption: **PokerChip**

Password

Continue

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 Customer Service.

The screenshot shows the iConnectData (ICD) home page. At the top right, there is a user profile dropdown for 'JONCHD', a 'Quick Access' dropdown, and a 'Logout' button. Below this is a blue navigation bar with icons and labels for HOME, MANAGE, REPORTING, FIND, PAYMENT CENTER, and HELP. A red box highlights this navigation bar. Below the navigation bar, there is a light blue informational message about pop-up blockers. To the left, there is a section for 'ICD Updates' with a 'NEWS AND NOTIFICATIONS' link and a 'What's New On ICD' button. To the right, there is a 'QUICKLINKS' section with a 'Select My QuickLinks' button and three tiles: 'Corporate Dashboard', 'Transaction Listing', and 'TMR Individual Transaction Price Detail'.

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 as an ATM Locator and a Merchant Locator.
Payment Center	Contains your online payment methods for paying invoices and your available credit.
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.

Use the Resource Center

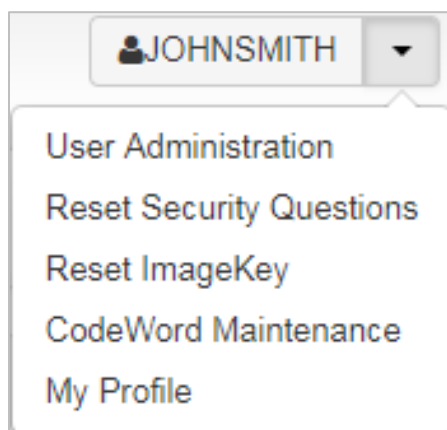
The Resource Center is packed with content on several products. To find content, you can:

- **Search for a Quick Answer.** When you need a quick answer, the search tool lets you narrow your search by product and content type.
- **Use the Product Pages.** Each product used in ICD has its own information page. Become a product knowledge expert by reading the latest release updates, quick steps, and user guides or watching informative training videos.
- **Watch Video Tutorials and Recorded Webinars.** Do you prefer learning by watching visual instructions? Watch a video tutorial or recorded webinar to view instructions in action!

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.

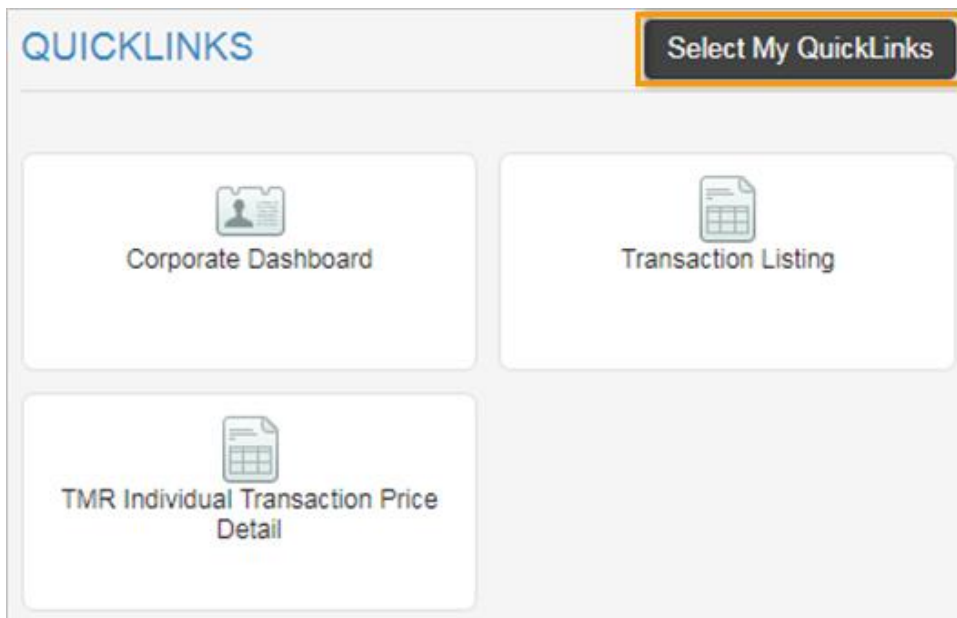


Set Up QuickLinks

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.

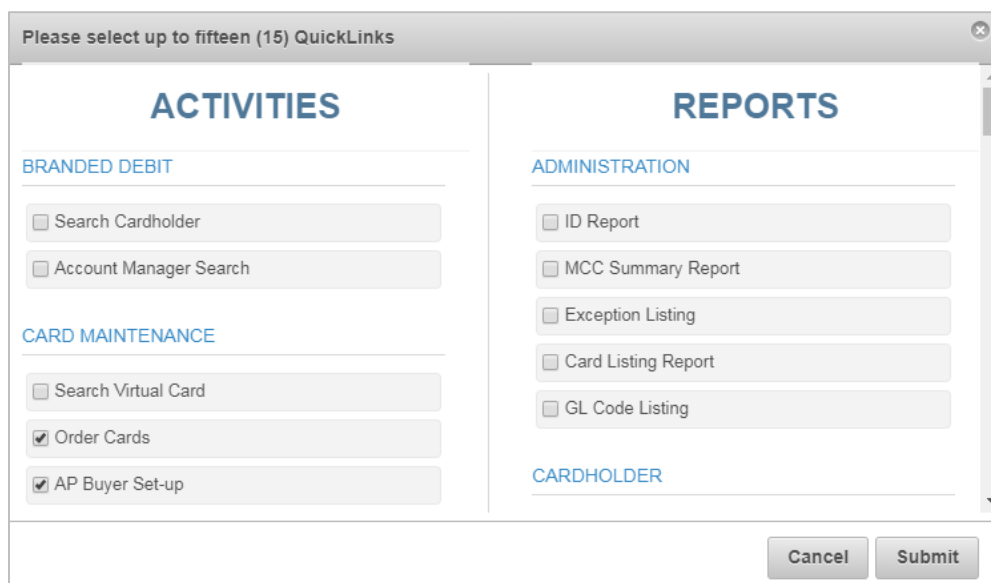
Locate the QuickLinks tool on the ICD home page and follow these steps:

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

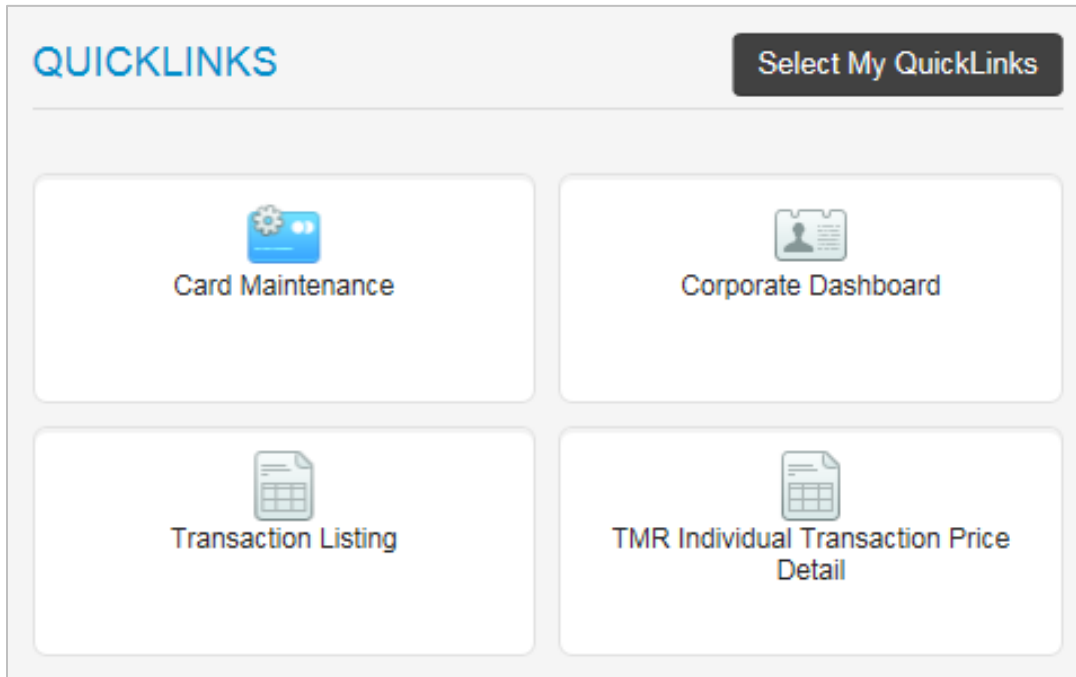


2. Select the check box next to each page you often use and then click **Submit**. You can select or deselect QuickLinks at any time.

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.



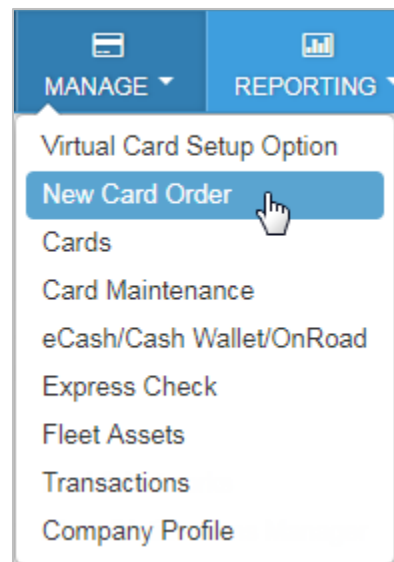
Managing your Cards

Managing your cards is an important part of any product offering. With ICD, you have easy access to your cards and an abundance of management features to help you run your program smoothly.

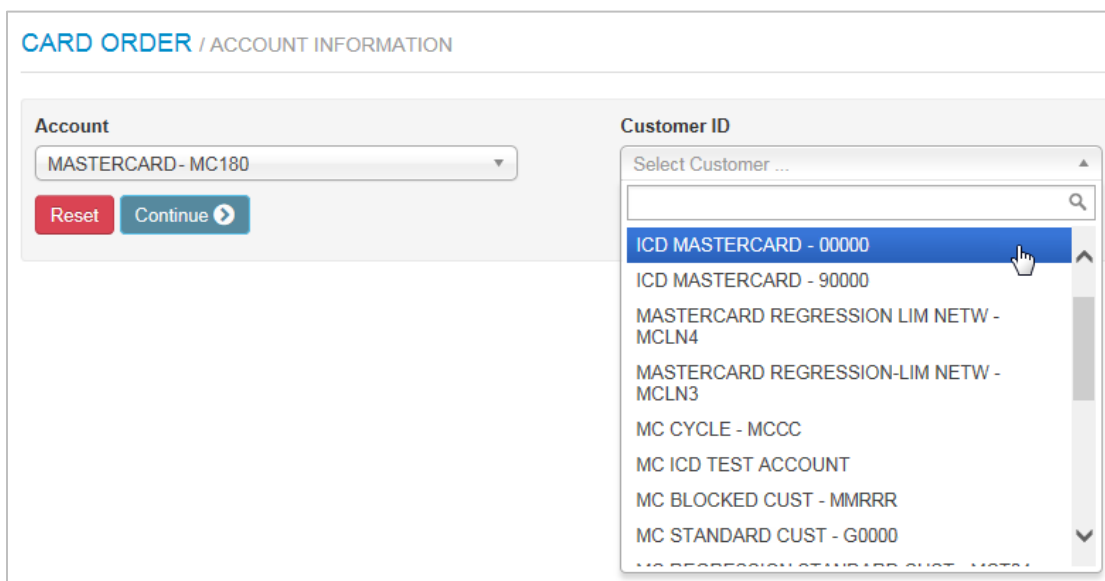
Order a New Mastercard

If you are a Mastercard customer, follow these steps to order a Mastercard using the New Card Order feature in iConnectData (ICD).

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



2. Select an account code and customer ID for ordering a Mastercard. If you have only one account code and customer ID, these fields will automatically be filled in for you.

A screenshot of the 'CARD ORDER / ACCOUNT INFORMATION' page in the iConnectData (ICD) system. The page is divided into two main sections: 'Account' and 'Customer ID'. The 'Account' section has a dropdown menu currently showing 'MASTERCARD - MC180' and two buttons: a red 'Reset' button and a blue 'Continue' button with a right-pointing arrow. The 'Customer ID' section has a search box labeled 'Select Customer ...' with a magnifying glass icon. Below the search box is a list of customer IDs, with 'ICD MASTERCARD - 00000' selected and highlighted in blue. Other visible options in the list include 'ICD MASTERCARD - 90000', 'MASTERCARD REGRESSION LIM NETW - MCLN4', 'MASTERCARD REGRESSION-LIM NETW - MCLN3', 'MC CYCLE - MCCC', 'MC ICD TEST ACCOUNT', 'MC BLOCKED CUST - MMRRR', and 'MC STANDARD CUST - G0000'. A vertical scrollbar is visible on the right side of the list.

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

MASTERCARD CARD ORDER / ACCOUNT INFORMATION

Account: MASTERCARD - MC180
Customer ID: ICD MASTERCARD - 00000

Card Action: --Select One--
New Card
Replace Existing Card
Batch of cards

- The page refreshes to display a **Purchase Profile** drop-down and **Punch Card Options** radio buttons. Select the card's purchase profile and the **Punch Card** radio button.

Note: Ordering ghost cards in New Card Order is not available at this time. You can order a [ghost Mastercard using Classic ICD](#).

Card Action: New Card
Purchasing Profile: -- Select One --
Punch Card Options: Punch Card, Ghost Card

- After making your selections, click **Continue**. If needed, click **Reset** to clear your choices and start over.

MASTERCARD CARD ORDER / ACCOUNT INFORMATION

Account: MASTERCARD REGRESSION INC - MC180
Customer ID: ICD MASTERCARD REGRESSION - 72015
Card Action: New Card
Purchasing Profile: [001] DRIVER FUEL ONLY(...)
Punch Card Options: Punch Card, Ghost Card

Reset Continue

- The page refreshes to display additional fields needed to enter details on your card order. These fields will match the profile you selected. For example, if you select a vehicle card profile, you will need to complete fields for ordering a vehicle card.

Complete each field as needed and then click **Continue** at the bottom of the page. Required fields are denoted with a red asterisk.

Note: The information you enter here will be punched on the card and programmed into the magnetic stripe. While some of this information can be changed after ordering the card, the values entered in the **First Name** and **Last Name** fields will be embossed on the card.

(see sample image on the next page)

EMPLOYEE CARD FIELDS

EMPLOYEE CARD

Customer ID 72015	First Name* <input type="text"/>	Last Name* <input type="text"/>		
Employee Number* <input type="text"/>	Status Active	Driver License Number <input type="text"/>	Drivers License State/Province -- Select One --	
Mobile # (ie:1234567890) <input type="text"/>	Email Address <input type="text"/>	CC Email Address <input type="text"/>		

VEHICLE INFO

Vehicle Number* <input type="text"/>	VIN # <input type="text"/>	License Plate Number <input type="text"/>	Registration Expires <input type="text"/>
Vehicle Description <input type="text"/>	Miscellaneous #1 <input type="text"/>	Miscellaneous #2 <input type="text"/>	Miscellaneous #3 <input type="text"/>
Trip Number <input type="text"/>	Trailer Number <input type="text"/>		

[Cancel](#) [Continue](#)

VEHICLE CARD FIELDS

VEHICLE CARD

Customer ID 72015	Vehicle Type* Vehicle	Additional Information TRUCK	Vehicle Number* 1234
-----------------------------	---------------------------------	--	--------------------------------

The combined information in the 3 fields above is limited to 24 characters. 17 [VEHICLE TRUCK 1234]

Employee Number* 1234	Status Active	Driver License Number <input type="text"/>	Drivers License State/Province -- Select One --
Mobile # (ie:1234567890) <input type="text"/>	Email Address <input type="text"/>	CC Email Address <input type="text"/>	

VEHICLE INFO

Vehicle Number 1234	VIN # <input type="text"/>	License Plate Number <input type="text"/>	Registration Expires <input type="text"/>
Vehicle Description <input type="text"/>	Miscellaneous #1 <input type="text"/>	Miscellaneous #2 <input type="text"/>	Miscellaneous #3 <input type="text"/>
Trip Number <input type="text"/>	Trailer Number <input type="text"/>		

[Cancel](#) [Continue](#)

Note the following:

- The **First Name** and **Last Name** fields will not accept numeric values (example: CARD1, VEHICLE1).
- When ordering vehicle cards, the information entered in **Vehicle Type**, **Additional Information**, and **Vehicle Number** will be embossed on the card. The combined values of all three fields is limited to a maximum of 24 characters.
- The **Mobile #** field is open for editing only if the customer ID is set up for Alerts and Notifications. Complete the **Mobile #** and **Cardholder Email Address** fields to enroll the cardholder in Alerts and Notifications. Both fields require a valid entry (**Mobile #**: 10-digits, **Cardholder Email Address**: a full email address, example: user@domain.com). You can enter a country code in the **Mobile #** field after the first save.

7. Complete the shipping address fields, then click **Submit**.

SHIPPING ADDRESS

ATTN: * Shipping Address* Shipping Method*

PLEASE ENTER ADDRESS

Company Name:* Address 1:* Address 2: Recently Used Addresses

City: * State: * Zip Code: * Miscellaneous :

Field	Description
ATTN	The person, department, entity, etc. responsible for receiving the card. Defaults to the name of the user logged into ICD.
Shipping Address	<ul style="list-style-type: none"> • Customer Address: The address on file for the selected customer ID. • Account Address: The address on file for the selected account code. • Card Address: Allows you to enter a custom address. Card Address contains a Recently Used Addresses drop-down that will save your five most recently entered card addresses. You can change and overwrite these addresses at any time.
Shipping Method	Select a delivery method. Depending on your preferred delivery vendor, options include: <ul style="list-style-type: none"> • Fedex Two-day (2nd Day Air) • Fedex International Priority • Fedex Priority Overnight • UPS 2nd Day • UPS Ground • UPS Worldwide Expedited <p style="text-align: center;"><i>(continued on next page)</i></p>

Field	Description
	<p>Note: If you select an expedited shipping method (Fedex Priority Overnight or UPS Next Day Air), you must accept the associated card fees. In addition, any next day order must be placed by 10:45 AM Central Standard Time for the order to meet next business day delivery. You cannot place expedited orders for P.O. box addresses.</p>

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

Card Order Confirmation ✕

MASTERCARD INFORMATION

Status:
CARD ADDED

Account Code:	Customer ID:	
BB000	88888	
Punch Cards:	Number Of Cards:	Card Number(s):
Yes	1	5567356000000000

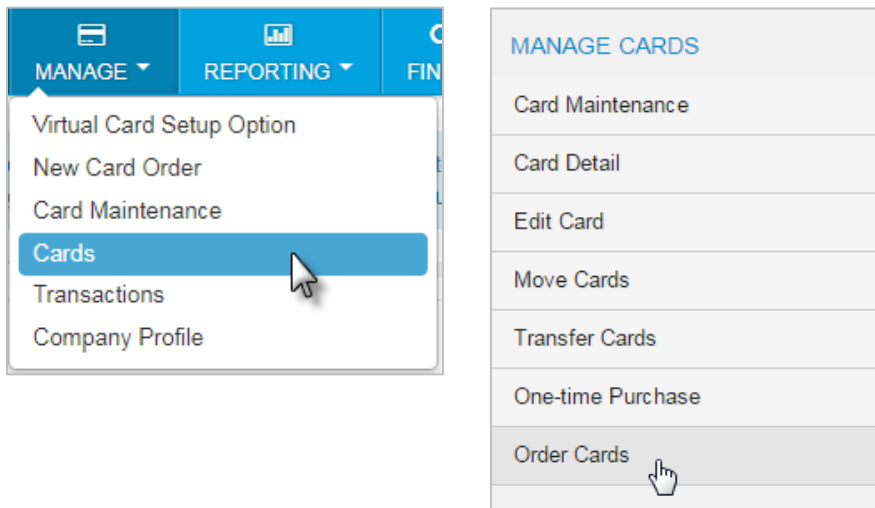
ADDRESS INFORMATION FOR CARD ORDER

Attention To:	Company Name:	Address 1:	Address 2:
SHANTHI	COMPANY	5301 MARYLAND	1113 MARYLAND

Order a Ghost Mastercard

Ghost Mastercard cards are Mastercard numbers to be kept on file with vendors with whom your business has an established relationship. Rather than creating a regular plastic MasterCard to be kept on file with a vendor, such as a hotel, you can simply create a card number for the vendor to run when needed.

1. From the ICD menu bar, select **Manage > Cards > Order Cards**.



2. If you have multiple customer IDs, the Card Maintenance page will display with a message stating that you must select a customer ID in order to proceed. Make your selection. If your account code has only one customer ID, skip to step 3.

Card Maintenance

Please select a Customer ID before click 'Order Card'.

Account Number:

Customer ID:

Customer ID Drop Down Sort by: Customer Name Customer ID Number

Search By: Employee/Vehicle Number Card Number Last Name

Search Value:

- On the Add a Card page, select a Profile for the card, then select the **Ghost Card** radio button. Failure to do so will result in the creation of a plastic MasterCard.

Add a Card

Customer ID: 86368

Purchasing Profile Number: [001] PROFILE 1 (Employee) ▼

Punch Card Options: Punch Card Ghost Card

- On the Add an Employee Card page, complete each of the required fields denoted by a red asterisk. This includes a first and last name (the vendor information can be entered here), employee and vehicle numbers (vendor number), and card status. Verify your information, then select **Confirm**.

Add an Employee Card

* indicates a required field

Customer ID: 86368

Purchasing Profile Number: 001

Punch Card: No

* **First Name:**

* **Last Name:**

* **Employee Number:**

Status: ▼

* **Vehicle Number:**

Trip Number: n/a

Trailer Number: n/a

Driver's License Number:

Driver License State/Province: ▼

VIN: n/a

Vehicle Description: n/a

License Plate Number: n/a

Registration Expires (MMYY): n/a

Miscellaneous #1: n/a

Miscellaneous #2: n/a

Cardholder E-Mail Address:

CC E-Mail Address:

- 5. The Card Add Confirmation page opens and notes that the Card was not punched. Note that the full card number will display on this page.

Click **Edit** to open the Edit an Employee Card page and apply edits to the card and to see the CVC2 security number. Click **Add** to place another card order.

Note: If you do not have the option to see the CVC2 security number, contact your Customer Service to add this functionality to your ICD profiles.

Card Add Confirmation

Status: Card Add was successful. Card was not punched.

Account Code: LH700
Customer ID: FLA00
First Name: TEST
Last Name: TEST
Employee Number: 8888888888888888
Card Number: 5567000000000009
Card Expiration Date: 0716
Card Status: Active
Purchasing Profile Number: 001 DAILY LIMIT
GL Code Transaction Assignment Profile: No Profile Assigned
Vehicle Number: 888888
Trip Number:
Trailer Number:
Driver's License Number:
Driver License State/Province:
VIN:
Vehicle Description:
License Plate Number:
Registration Expires (MMYY): 0000
Miscellaneous #1:
Miscellaneous #2:
Cardholder E-Mail Address:
CC E-Mail Address:

[Edit](#) [Add](#)

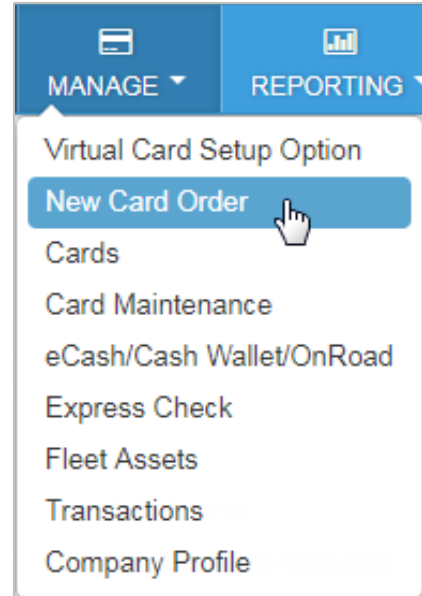
Order a New Proprietary Card

If you are a Proprietary card customer, follow these steps to order Proprietary cards.

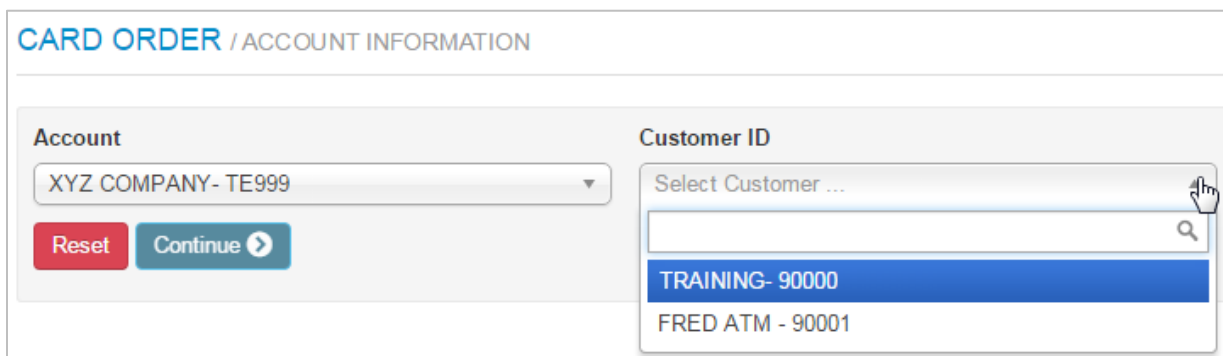
Order a Single Proprietary Card

As a Proprietary card customer, you can order a single or multiple 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 (such as Mastercard accounts), you will receive an error.

A screenshot of a web form titled 'CARD ORDER / ACCOUNT INFORMATION'. The form is divided into two main sections: 'Account' and 'Customer ID'. The 'Account' section has a dropdown menu with 'XYZ COMPANY- TE999' selected, and two buttons: 'Reset' (red) and 'Continue' (blue with a right arrow). The 'Customer ID' section has a search box with the placeholder text 'Select Customer ...' and a magnifying glass icon. Below the search box, a list of customer IDs is displayed: 'TRAINING- 90000' (highlighted in blue) and 'FRED ATM - 90001'. A mouse cursor is pointing at the search box.

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

Card Action


New Card

--Select One--

New Card

Replace Existing Card

Batch of cards

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

Company Standard

-- Select One --

-- Select One --

[001] STANDARD

[002] GALLON LIMITS

[003] OFF HOURS

- 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**.

DRIVER / EMPLOYEE INFORMATION

Customer ID 24719	First Name <input type="text"/>	Last Name <input type="text"/>	Status Blocked
Driver License Number <input type="text"/>	Drivers License State -- Select One --	Employee Number <input type="text"/>	
Phone Number (ie : 1234567890) <input type="text"/>	Mobile Number (ie : 1234567890) <input type="text"/>	Email Address <input type="text"/>	CC Email Address <input type="text"/>

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.

VEHICLE INFO

Vehicle Number/Unit Number VIN # License Plate Number Registration Expires

Vehicle Description Miscellaneous #1 Miscellaneous #2 Miscellaneous #3

Trailer Number Trip Number

Cancel **Continue**

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

SHIPPING ADDRESS

ATTN: *
CS TRANSPORTATION TRAINING

Shipping Address*
Customer Address
-- Select One --
Customer Address
Account Address
Card Address

Shipping Method*
United Postal Service

ADDRESS
CS TRANSPORTATION TRAINING
5301 MARYLAND WAY
DO NOT DELETE
BRENTWOOD TN
US 370270000

Cancel **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.

The screenshot shows a window titled "Card Order Confirmation" with a close button in the top right corner. The window is divided into two main sections: "CARD INFORMATION" and "ADDRESS INFORMATION FOR CARD ORDER".

CARD INFORMATION

Status:
Card order successful.

Account Code: L0000	Customer ID: 24719	
Punch Cards: Yes	Number Of Cards: 1	Card Number(s): 5600000000000000

ADDRESS INFORMATION FOR CARD ORDER

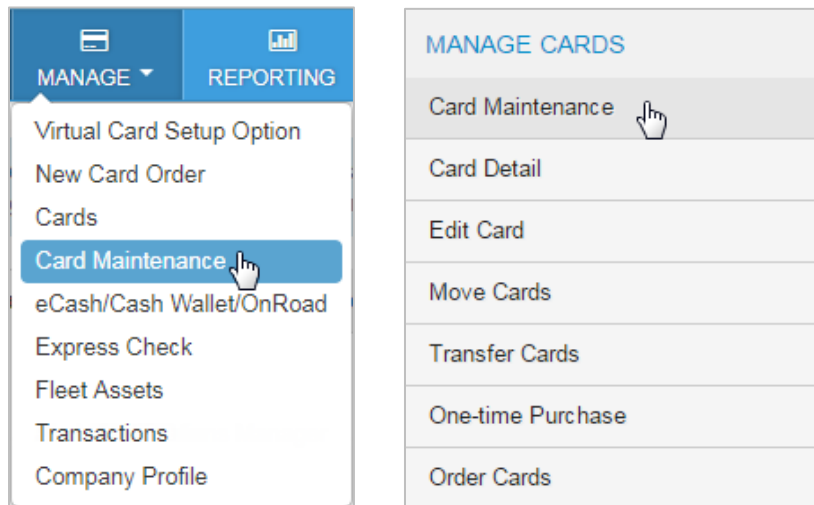
Attention To: CS	Company Name: CS	Address 1: 5301 MARYLAND	Address 2: **DO NOT DELETE**
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An "OK" button is located at the bottom right of the window.

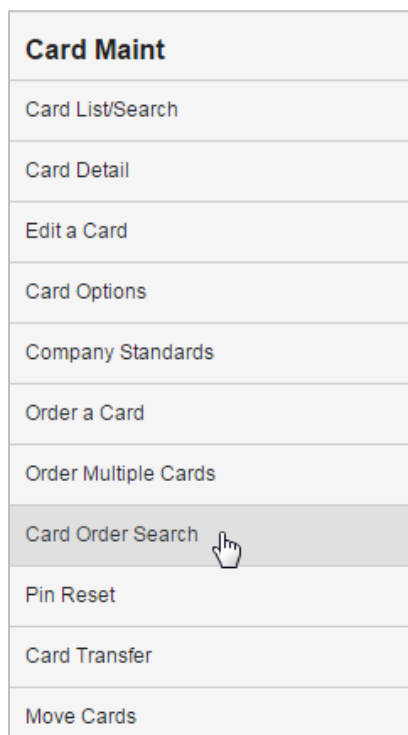
Search for Card Orders

This feature allows you to search for Mastercard orders placed through ICD during the previous six-month period. You can display the search results on the page, or you can download the results to an Excel spreadsheet. Note that your account must be set up for access to this feature.

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



2. Select **Card Order Search** from the left-hand menu.



3. Select a different account code or customer ID, if necessary. Use the **Search By** field to sort your search results by order date or shipment date. Then, enter the start and end date. Click **Submit** when finished. Click **Save as Excel** to download the results as an Excel spreadsheet.

Note: The date range is limited to 45 days within the previous six-month period.

Card Order Search

Account Number:

Customer ID:

Customer ID Drop Down Sort by: Customer Name Customer ID Number

Search By: Order Date Ship Date

Date Range: Start Date: End Date:

4. The Card Order Listing page displays, showing all existing card orders for the selected date range. Details on each order include the selected account and customer ID, the date the order was received, card number, cardholder’s full name, order status, any exceptions, ship date and tracking number. Click a link in the tracking number column to track your order.

Card Order Listing

Account ID ZZ222 Customer ID 00000

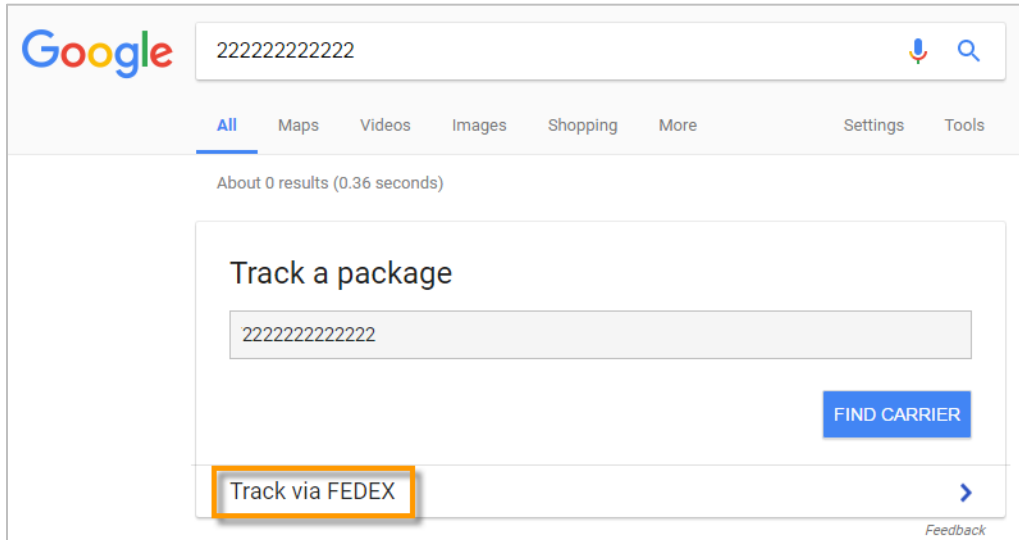
Please click on the tracking number to get card shipping status.

Viewing order 1 to 4 of 4

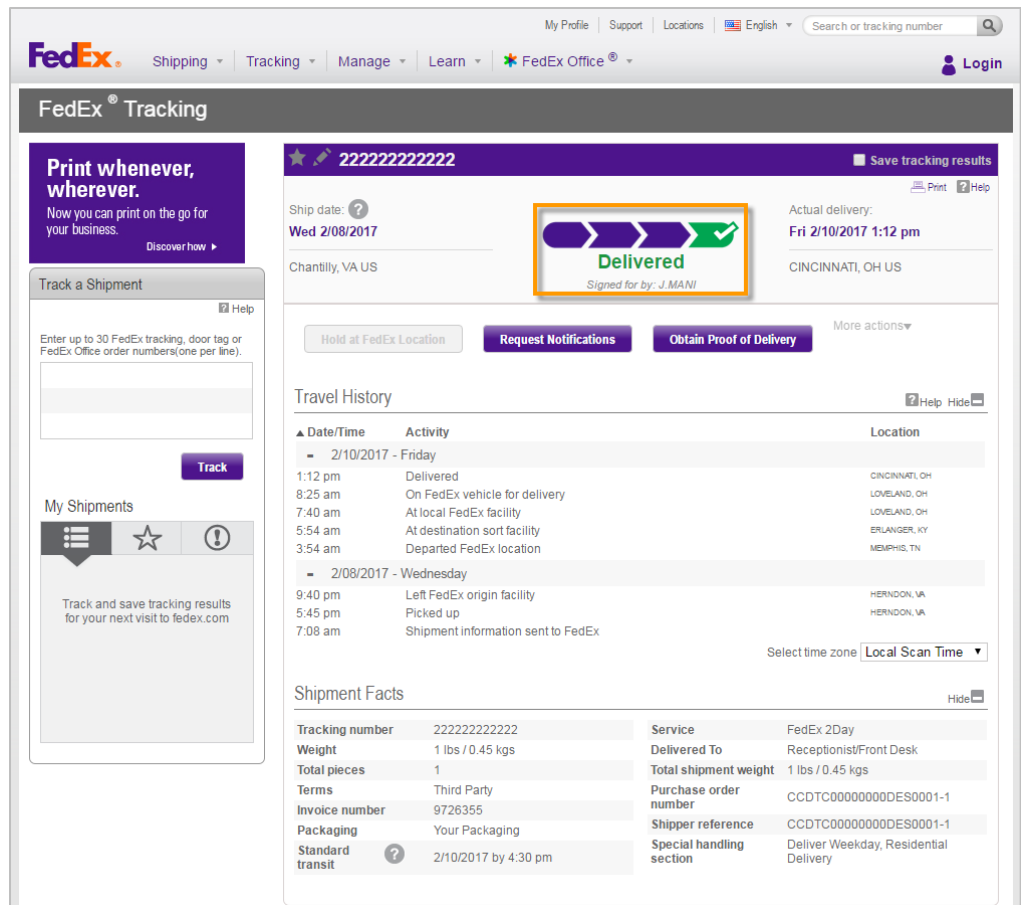
Account Number	Customer ID	Date Order Received	Card Number	Cardholder Name	Order Status	Exception	Date Order Shipped	Tracking Number
ZZ222	00000	02/28/2015	5567356025200000	9000 VEHICLE	Shipped		02/28/2015	2222W5615022818
ZZ222	00000	02/28/2015	5567356025277777	JIMMIE EMP	Shipped		02/28/2015	2222W5615022817
ZZ222	00000	02/28/2015	5567356025298888	3333 VEHICLE	Shipped		02/28/2015	99999999999999
ZZ222	00000	02/27/2015	5567356025655555	CARDORDER JIMEMP	Shipped		02/27/2015	1Z44W5610215603358

- Your web browser opens with a web page displaying your card's tracking number. Click Track via Fedex (or Track via UPS, depending on your card carrier).

Note: If you want to track a different order from this page, enter the tracking number in the Track a package field, and then click **Find Carrier**.



- The delivery services page, such as FedEx, opens with the current status of your order (Delivered, In Transit, etc.). This page will also display your order's travel history and shipment details.



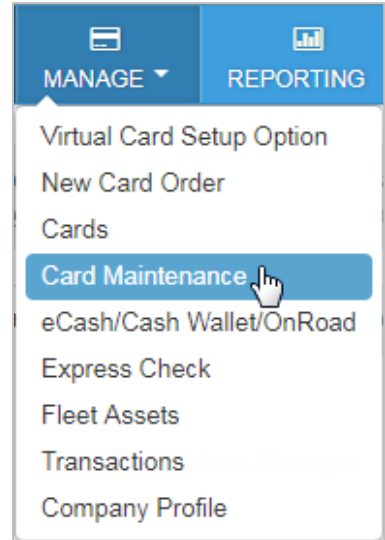
Use Card Maintenance

Card maintenance provides many options for searching for cards, editing cards, and updating cards. This entire section applies to Mastercard cards and Proprietary 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.


 A screenshot of the search and filter interface. On the left, there is a search field containing the text 'ha', a search icon, and a filter button (a square with a downward arrow). Below the search field is a checkbox labeled 'Select All' and the text 'Showing 16 of 16'. On the right, there are four filter dropdown menus: 'Sort By', 'Show only', 'Account', and 'Customer ID'.

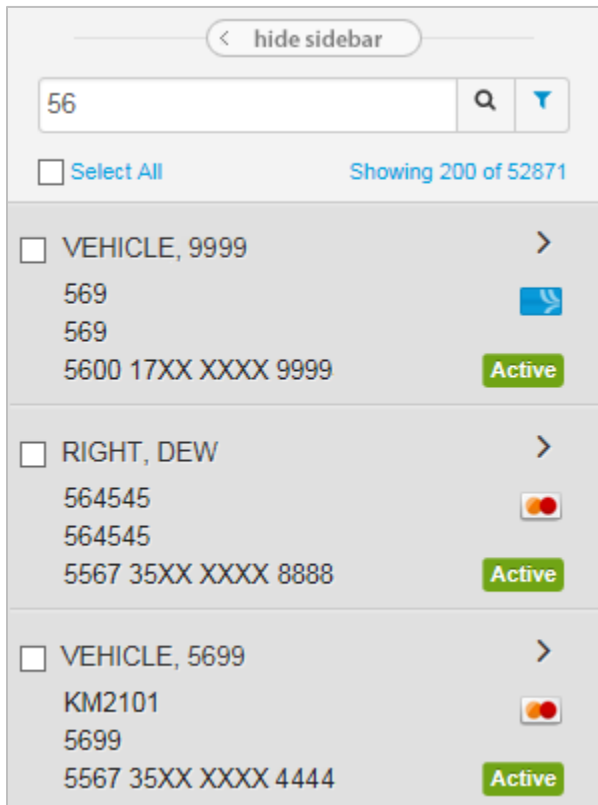
(continued on next page)

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.

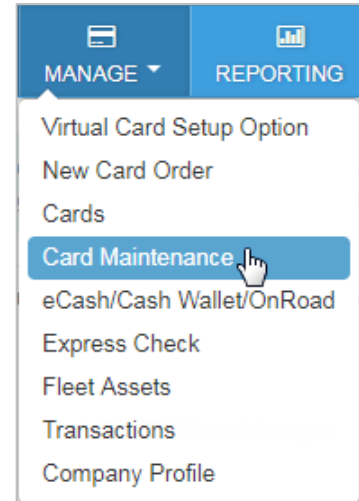
- After entering your search criteria, click the search button (). The card listing will display the first 200 cards you are authorized to access based on your search criteria. If the card you are searching for does not appear in the listing, try more specific filter options.



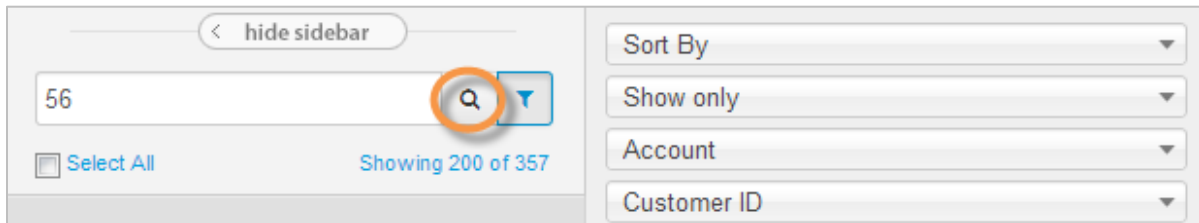
Editing a Card

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 Customer Service Representative.

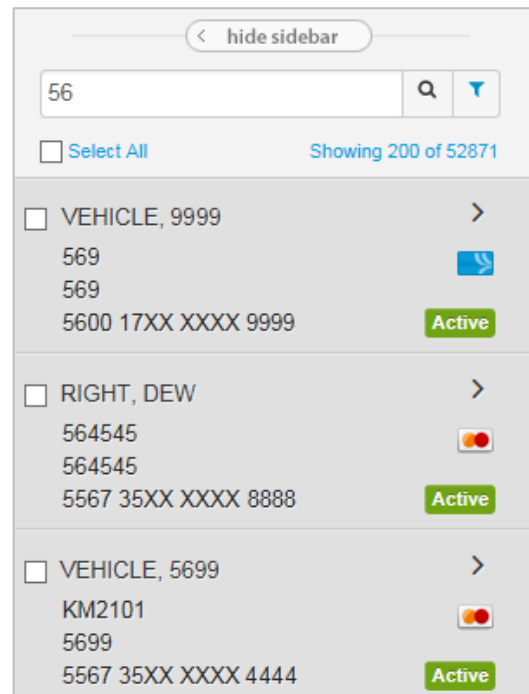
1. Access the Card Maintenance page from the iConnectData (ICD) menu bar (**Manage > Card Maintenance**).



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 pages for a description of each section.

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

A BASIC INFORMATION

Card Number: 5000000000000000
 Account ID: MC190
 Customer ID: MCR050
 Customer ID Description: MC REGRESSION STANDARD CUST
 Name: DAVID STEWART
 Profile: [000] CFF COMPANY STANDARDS
 Employee Number: 260001
 Last Activity Date/Time: 01/08/2014 13:44
 Expiration Date: 03/2014

B CARD HOLDER INFORMATION

Employed on Card: DAVID STEWART
 Registration Expiration: Not Available
 Driver License Number: 00000000
 Mtc 1: Not Available
 Mtc 2: Not Available
 Driver License State: CA
 Level 3 Prompting Required: Yes
 Fleet Level Prompting: 2
 Limited Network By Card: No
 Restricted Network: No

VEHICLE INFORMATION

Trip Number: Not Available
 Vehicle Number: 000000
 Hub Meter Start: 412.063
 Hub Meter End: 221.110
 Current MPG: 000.00
 Vehicle Identification Number (VIN): Not Available
 Vehicle Type: DRIVER
 Vehicle Plate Number: Not Available

SHIPPING INFORMATION

Address Ship To Name: MC REGRESSION REGULAR CUST
 Address Attention To: TERRI MELBURN
 Address 1: 5301 MARYLAND WAY
 Address 2: REGRESS ACCOUNT - DO NOT CHANGE
 City: BRENTWOOD
 State: TN
 Postal Code: 000000000

C NETWORK RESTRICTIONS

Clear Time Off Network Allowed: No
 Limited Network: No
 Restricted Network: No

D PRODUCT LIMITS

Limit	Daily Amount	Daily # of Trans.	Cycle Amount	Cycle # of Trans.
Limit	\$0.999.99	10	\$0.00	0
Posted	\$0.00	\$0.00	\$0.00	\$0.00
Pending Charges	\$0.00	\$0.00	\$0.00	\$0.00
Available	\$0.999.99	\$0.00	\$0.00	\$0.00
Reset Cycle	Unknown			
Status	Closed	Available	Yes	
One Time Override Amount	\$0.00	Transaction Limit	\$999.99	
Prompting	2	Prompting Description	LIM or Vehicle & Odometer	

E ECASHCASH WALLET

Express Cash: Not Available
 Maximo POS: Not Available
 VISA Access: No
 ATM Access: Not Available
 Express Cash Balance: Not Available
 PIN Reset: Click to Reset

ECASH ACTIVITY

Date/Time	Reference Number	Location	Trans Amount	Charges	Balance	Description
No activity found						

DIRECT DEPOSIT ACCOUNTS

No Direct Deposit Accounts exist



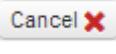
F TRANSACTION HISTORY




Transaction Date / Time	Posted Date / Time	Transaction Status	Merchant Name	MCC	Authorized Amount	Posted Amount
01/08/2014 01:44:50 PM	01/08/2014 01:44:50 PM	Posted	HERON CANADA	5655	\$55.75	\$53.95
01/08/2014 01:44:50 PM	01/08/2014 01:44:50 PM	Posted	HERON CANADA	5655	\$112.99	\$109.34
01/08/2014 01:44:50 PM	01/08/2014 01:44:50 PM	Posted	EATING PLACES	5812	\$0.00	\$0.00
01/07/2014 08:03:38 AM	01/07/2014 08:03:38 AM	Posted	HERON CANADA	5541	\$55.75	\$53.95
01/07/2014 08:03:38 AM	01/07/2014 08:03:38 AM	Posted	HERON CANADA	5541	\$112.99	\$109.34
01/07/2014 08:03:38 AM	01/07/2014 08:03:38 AM	Posted	EATING PLACES	5812	\$0.00	\$0.00
12/27/2013 01:10:52 PM	12/27/2013 01:10:52 PM	Posted	HERON CANADA	5541	\$55.75	\$53.95
12/27/2013 01:10:52 PM	12/27/2013 01:10:52 PM	Posted	HERON CANADA	5541	\$112.99	\$109.34
12/27/2013 01:10:51 PM	12/27/2013 01:10:51 PM	Posted	EATING PLACES	5812	\$0.00	\$0.00
12/26/2013 12:23:58 PM	12/26/2013 12:23:58 PM	Posted	HERON CANADA	5541	\$55.75	\$53.95

G RECENT CARD UPDATES

Field	Action	Old Value	New Value	Time/Date	OPR ID
STATUS	CHG	B	A	8:48:21 AM / Feb 7, 2014	820
LASTNAME	ADD		TEST9	8:48:21 AM / Feb 7, 2014	820
1ST NAME	ADD		MC RITADAY WIS	8:48:21 AM / Feb 7, 2014	820
EMPLOYEE	ADD		MC RITADAY WIS	8:48:21 AM / Feb 7, 2014	820
UNIT NR	ADD		8	8:48:21 AM / Feb 7, 2014	820
FUEL OFFHW	ADD		N	8:48:21 AM / Feb 7, 2014	820

A. Basic Information

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

BASIC INFORMATION Edit 	
CARD NUMBER 5600000000000000	ACCOUNT ID JJ000
CUSTOMER ID 77777	CUSTOMER ID DESCRIPTION CASH
NAME JANET USERADMIN	PROFILE [001] DEFAULT LIMITS
GL CODE TRANSACTION ASSIGNMENT PROFILE Not Available	EMPLOYEE NUMBER 8888
STATUS Active <ul style="list-style-type: none">  Move Card  Transfer Card 	LAST ACTIVITY DATE/TIME 04/02/2015 08:02
COUNTRY CODE US	

Click the **Move Card** option under the **Status** field to move the card to a new customer ID.

MOVE CARD ✕

Please select the new destination cust id

Move

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.

TRANSFER CARD ✕

Please enter the 16-digit destination card number

Transfer

B. 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.

CARD HOLDER INFORMATION Edit		
DISPLAYED ON CARD JANE MIA	DRIVER LICENSE NUMBER TN00000000	DRIVER LICENSE STATE TN
MISC 1 Not Available	MISC 2	MISC 3
REGISTRATION EXPIRATION		
VEHICLE INFORMATION		
TRIP NUMBER 3333	UNIT NUMBER 88888	TRAILER NUMBER 8888
HUB METER START	HUB METER END	CURRENT MPG
HUB METER MIN 0	HUB METER MAX 0	VEHICLE IDENTIFICATION NUMBER (VIN)
VEHICLE DESCRIPTION	VEHICLE TYPE DRIVER	VEHICLE PLATE NUMBER
VEHICLE TANK CAPACITY Not Available		

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.

SHIPPING INFORMATION		
ADDRESS SHIP TO NAME TEST	ADDRESS ATTENTION TO JANE MIA	
ADDRESS 1 5301 MARYLAND WAY	ADDRESS 2	
CITY BRENTWOOD	STATE TN	POSTAL CODE 37027

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 Customer Service Representative for access to this feature.

NETWORK RESTRICTIONS

ONE TIME OFF NETWORK ALLOWED ? | LIMITED NETWORK BY CARD ? | RESTRICTED NETWORK ?

No | No | No

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.

NETWORK RESTRICTIONS

ONE TIME OFF NETWORK ALLOWED ? | LIMITED NETWORK BY CARD ? | RESTRICTED NETWORK ?

YES NO | YES NO | No

LIMITED NETWORK BY CARD

Location Code	Daily Limit	Reefer Limit	Max Cash Limit
AZ000	100.00 gl/L	100.00 gl/L	\$ 200.00

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.

NETWORK RESTRICTIONS

ONE TIME OFF NETWORK ALLOWED ? | LIMITED NETWORK BY CARD ? | RESTRICTED NETWORK ?

YES NO | YES NO | No

LIMITED NETWORK BY CARD

Location Code	Daily Limit	Reefer Limit	Max Cash Limit	
TN000	100.00 gl/L	100.00 gl/L	\$ 200.00	Cancel X
AZ000	100.00 gl/L	100.00 gl/L	\$ 200.00	Cancel X

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 see the Overall Limits, Mastercard Limits, or Merchant Category Code (MCC) Group Limits for the card. *To make edits, the card profile must be off company standards.*

- **Overall Limits** refers to the overall dollar and transaction limits on the card. These limits apply no matter where the card is used.
- **Mastercard Limits** refers to the dollar and transaction limits at Mastercard accepting merchants. Mastercard limits cannot exceed the Overall limits. For example, if the Overall daily limit is \$1000, the maximum Mastercard daily limit equals \$999.99.
- **MCC Group Limits** refers to dollar and transaction limits at specific merchant groups and MCC groups. This feature allows you to lock the card’s usage down to specific types of merchants, such as fuel, finance, maintenance, travel, etc. MCC group limits cannot exceed the Mastercard and Overall limits.

PRODUCT LIMITS Edit								
Overall Limits MasterCard Limits MCC Group Limits								
LIMITS ARE SET AT THIS LEVEL								
	Transaction Amount	Transaction Qty.	Daily Amount	Daily # of Trans.	Daily Qty.	Cycle Amount	Cycle # of Trans.	Cycle Qty.
Limit	\$10,000.00	0	\$10,000.00	1	0	\$0.00	0	0
Posted	not applicable	not applicable	\$0.00	0	0	\$0.00	0	0
Pending Charges	not applicable	not applicable	\$0.00	0	0	\$800.00	1	0
Available	not applicable	not applicable	\$10,000.00	1	0	\$-800.00	-1	0
Reset Cycle	Unknown							
STATUS	Open			AVAILABLE		Yes		
ONE TIME OVERRIDE AMOUNT	\$0.00							
PROMPTING	2			PROMPTING DESCRIPTION		Unit or Vehicle & Odometer		

Click **Edit** to open any of the available fields for editing. Click **Change** next to **Reset Cycle** to set the reset cycle as daily, weekly, or monthly. The system defaults to **Daily**.

PRODUCT LIMITS Save Cancel								
Overall Limits MasterCard Limits MCC Group Limits								
LIMITS ARE SET AT THIS LEVEL								
	Transaction Amount	Transaction Qty.	Daily Amount	Daily # of Trans.	Daily Qty.	Cycle Amount	Cycle # of Trans.	Cycle Qty.
Limit	<input type="text" value="10000"/>	<input type="text" value="0"/>	<input type="text" value="10000"/>	<input type="text" value="1"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="0"/>
Posted	not applicable	not applicable	\$0.00	0	0	\$0.00	0	0
Pending Charges	not applicable	not applicable	\$0.00	0	0	\$800.00	1	0
Available	not applicable	not applicable	\$10,000.00	1	0	\$-800.00	-1	0
Reset Cycle	Unknown Change							
STATUS	<input checked="" type="radio"/> OPEN <input type="radio"/> CLOSED			AVAILABLE		<input checked="" type="radio"/> YES <input type="radio"/> NO		
ONE TIME OVERRIDE AMOUNT	<input type="text" value="0"/>							
PROMPTING	2			PROMPTING DESCRIPTION		Unit or Vehicle & Odometer		

E. Product Limits (Proprietary)

If you're editing a Proprietary card, 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.

CASH LIMITS
Edit

CASH LIMIT \$300.00	AMOUNT USED \$0.00	RESET Daily
ONE TIME Not Available	ALLOW ACCESS FOR ATM Not Available	ALLOW CASH OFF NETWORK No

FUEL LIMITS
Edit

FUEL ALLOWED Yes	ALLOW MULTIPLE TRANSACTIONS IN LESS THAN ONE HOUR No	AMOUNT USED \$0.00
LIMIT \$1,000.00	RESET Daily	ONE TIME Not Available
DIESEL #1/#2 LIMIT Not Available	REEFER LIMIT Not Available	ALL OTHER FUEL LIMIT 1,000 Gallons
OIL LIMIT Not Available		


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.*


PRODUCT LIMITS
Edit

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			

← Previous
1
2
3
4
Next →

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, 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.

ECASH/CASH WALLET Edit 

EXPRESS CASH
Yes

MAESTRO POS
Express Cash



VRU ACCESS
No

ATM ACCESS
Yes

EXPRESS CASH BALANCE
\$10.00 (Edit Funds)

PIN RESET
Click to Reset



ECASH ACTIVITY

Date/Time	Reference Number	Location	Trans Amount	Charges	Balance	Description	
04/07/2015 11:51 AM	470000050	TEST	(\$10.00) (-)	(\$2.00)	\$0.00	CNCL	
04/07/2015 11:48 AM	470000050	TEST	\$10.00 (P)	\$2.00	\$10.00	LOAD	

← Previous 1 Next →

DIRECT DEPOSIT ACCOUNTS +

Account Number	Routing Number	Account Name	Checking	Deposit Type	Amount	Status

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.

ADD DIRECT DEPOSIT ACCOUNT ×

ACCOUNT NUMBER

ROUTING NUMBER

ACCOUNT NAME

CHECKING

Yes ▼

TYPE

Percent of Load ▼

STATUS

Pending PreNote ▼

PERCENT

%

Save

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.

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
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

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.

RECENT CARD UPDATES					
Field	Action	Old Value	New Value	Time/Date	OPR ID
ICD USER	INFO	ABEL,JIM		7:55:02 PM / Mar 24, 2015	
UNIT NR	CHG	20	19	7:55:02 PM / Mar 24, 2015	
1ST NAME	CHG	ANTHONYX	ANTHONY	7:55:02 PM / Mar 24, 2015	
LASTNAME	CHG	JACKSONX	JACKSON	7:55:02 PM / Mar 24, 2015	
DL NBR	CHG	12589	1258	7:55:02 PM / Mar 24, 2015	
ICD USER	INFO	ABEL,JIM		7:54:13 PM / Mar 24, 2015	
UNIT NR	CHG	19	20	7:54:13 PM / Mar 24, 2015	
1ST NAME	CHG	ANTHONY	ANTHONYX	7:54:13 PM / Mar 24, 2015	
LASTNAME	CHG	JACKSON	JACKSONX	7:54:13 PM / Mar 24, 2015	
DL NBR	CHG	1258	12589	7:54:13 PM / Mar 24, 2015	

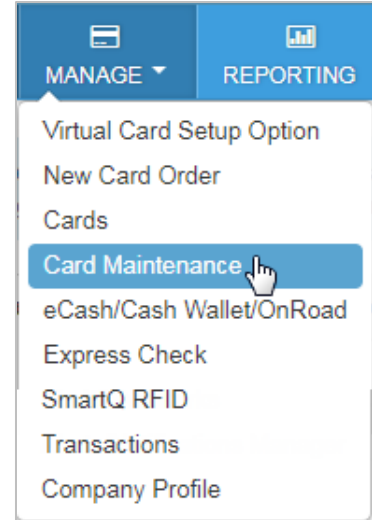
← Previous 1 2 Next →


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 an employee. 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.

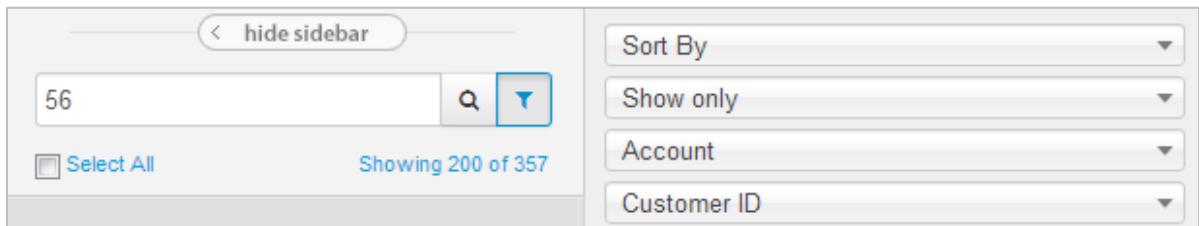
Update Multiple Cards

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

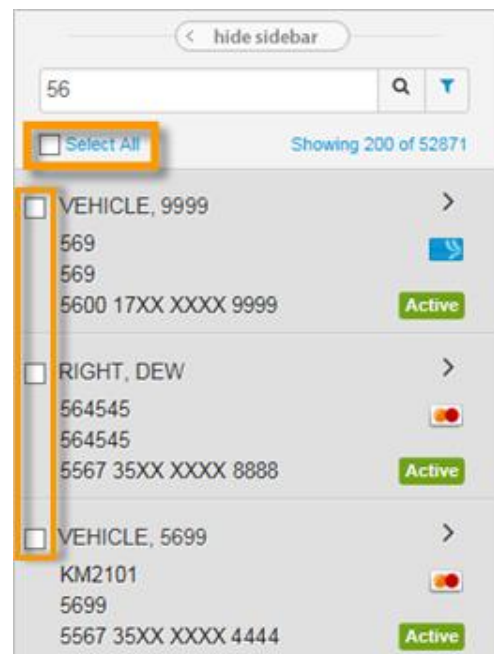
1. Access the Card Maintenance page from the iConnectData (ICD) menu bar (**Manage > Card Maintenance**).



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




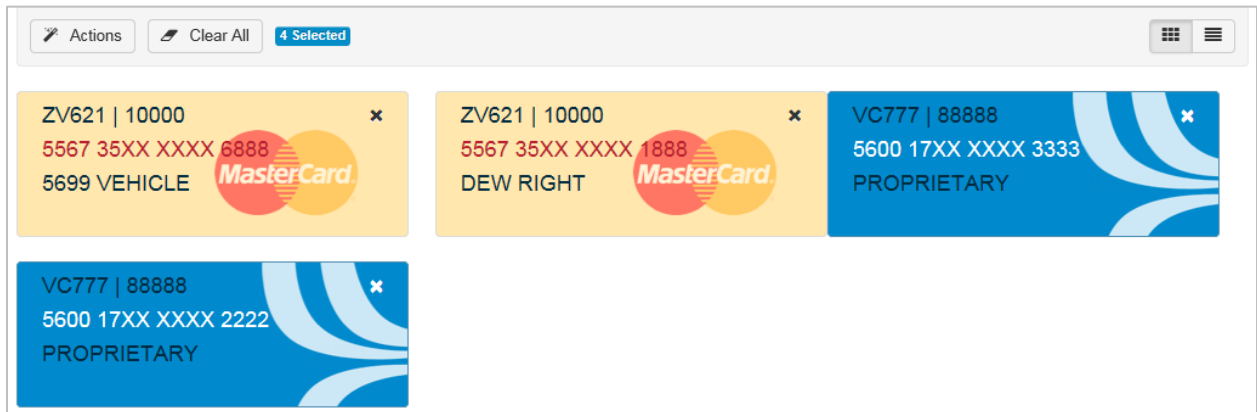
3. Select multiple cards from the listing by clicking the check box next to each one. Or click **Select All**.



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

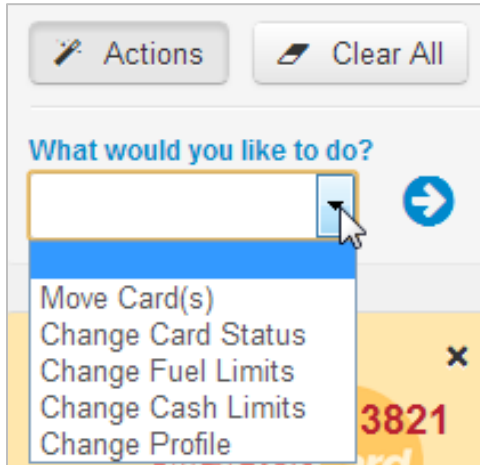
Note: To change the view from images to a list view, use the icons in the far right corner

(). 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.



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



- **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.


- 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.

Actions
 Clear All
Successful: 2
Errors: 2
4 Selected








WHAT WOULD YOU LIKE TO DO? PLEASE ENTER THE NEW PROFILE ID

Change Profile
▼
➔

 123

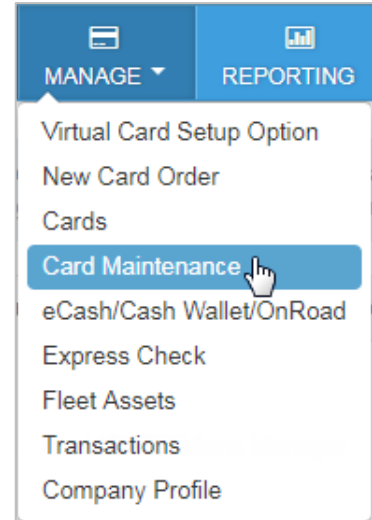
Submit
▼


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.							

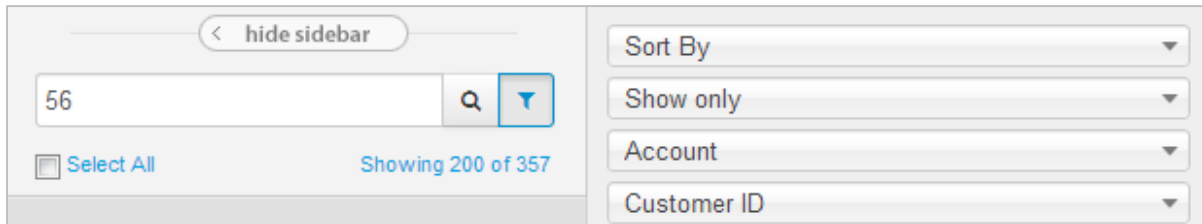
Activate Cards

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

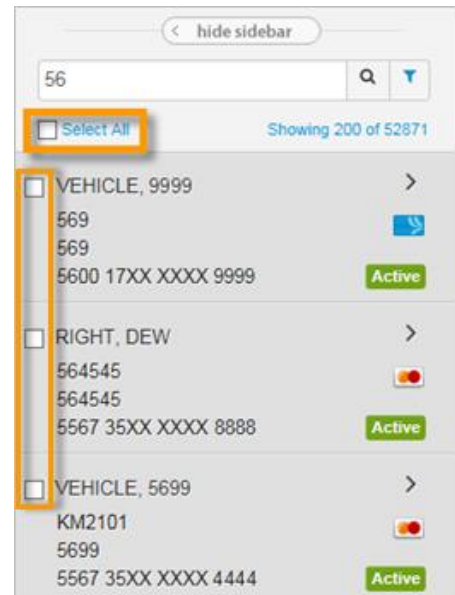
1. Access the Card Maintenance page from the iConnectData (ICD) menu bar (**Manage > Card Maintenance**).



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.



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

The screenshot shows the 'BASIC INFORMATION' section for a card. The card is currently in a 'Blocked' status. An 'Edit' button is highlighted in the top right corner. The card details are as follows:

CARD NUMBER	5567355980000000	ACCOUNT ID	QA994
CUSTOMER ID	025QA	CUSTOMER ID DESCRIPTION	568 ACCT
PROFILE	[001] 3/2/V	EMPLOYEE NUMBER	568
GL CODE TRANSACTION ASSIGNMENT PROFILE	Not Available	LAST ACTIVITY DATE/TIME	06/28/2018 07:43
STATUS	Blocked	MOBILE NUMBER	
ALERTS ENROLLMENT CARDHOLDER EMAIL		EXPIRATION DATE	04/2022
CARD HOLDER USAGE RPT EMAIL(S)			
COUNTRY CODE	US		



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

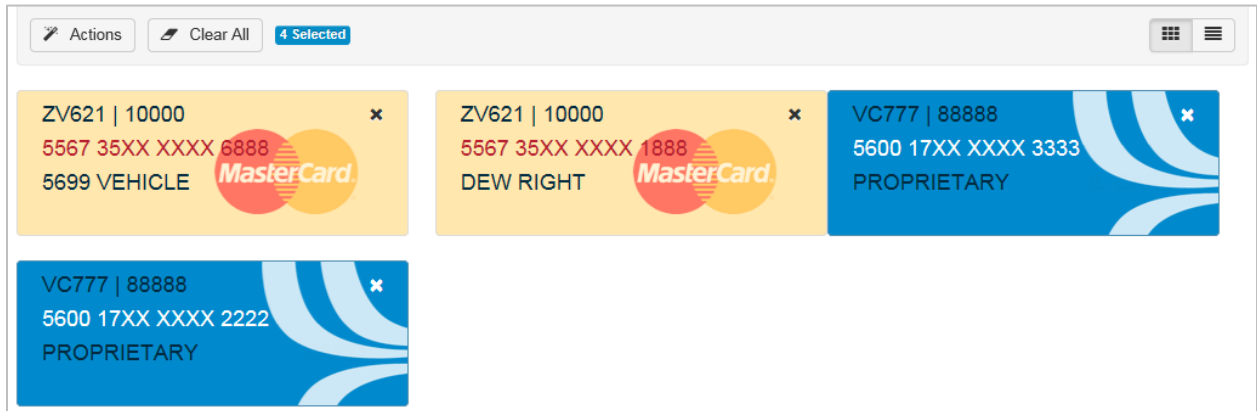
The screenshot shows the 'BASIC INFORMATION' section for a card. The card is now in an 'Active' status. The 'Save' button is highlighted in the top right corner. The card details are as follows:

CARD NUMBER	5567355980000000	ACCOUNT ID	QA994
CUSTOMER ID	025QA	CUSTOMER ID DESCRIPTION	568 ACCT
PROFILE	[001] 3/2/V	EMPLOYEE NUMBER	568
GL CODE TRANSACTION ASSIGNMENT PROFILE	Not Available	LAST ACTIVITY DATE/TIME	06/28/2018 07:43
STATUS	Active	MOBILE NUMBER	0
ALERTS ENROLLMENT CARDHOLDER EMAIL		EXPIRATION DATE	04/2022
CARD HOLDER USAGE RPT EMAIL(S)			
COUNTRY CODE	US		

- 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.

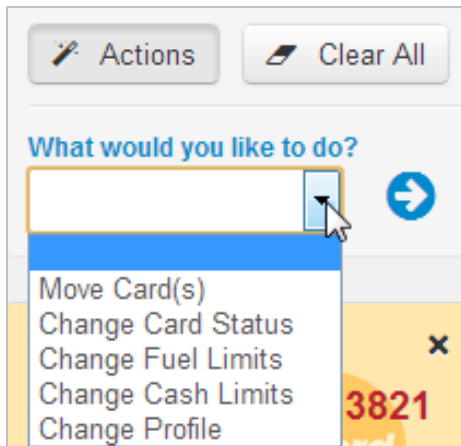
Note: To change the view from images to a list view, use the icons in the far right corner

( ). You can remove a card by clicking the small **x** button on the image. Click **Clear All** to remove all cards.

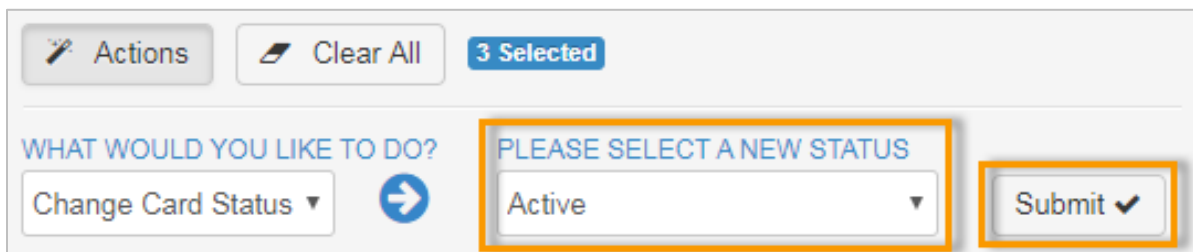


- Click **Actions** and then select **Change Card Status** from the drop-down.

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



- 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.

Actions
Clear All
Successful: 3
Errors: 0
3 Selected

☰
☰

WHAT WOULD YOU LIKE TO DO? PLEASE SELECT A NEW STATUS

Change Card Status

➔

Active

Submit ✓

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.

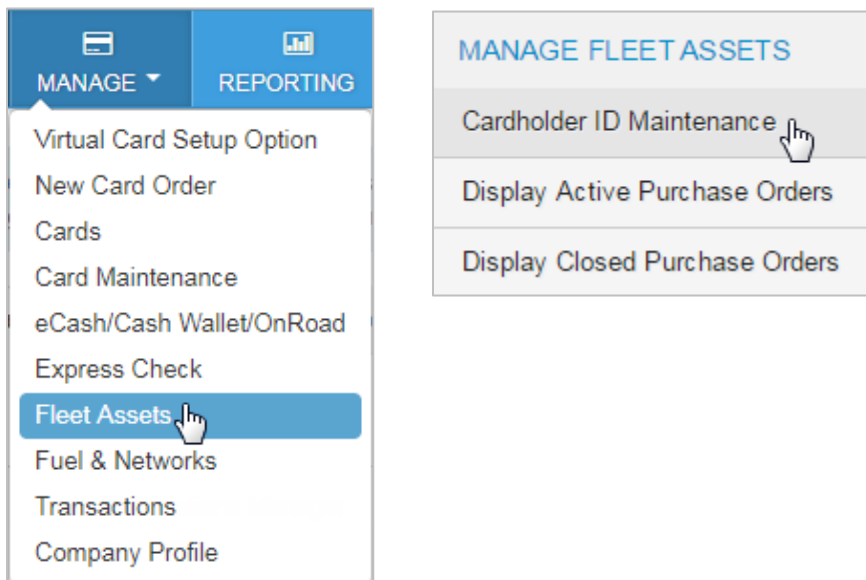
Performing Cardholder ID Maintenance

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**.

(image on next page)

Cardholder ID Maintenance - View List

Account Code:

Customer Id:


Search By: (optional)

Search Value:

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.

Cardholder ID Maint

Add 

View List/Delete

Upload Unassigned ID

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.

Cardholder ID Maintenance - Add Screen

Account Code:

Customer Id:

Fields that require information are designated with an asterisk.

* Cardholder ID	* First Name	* Last Name	Drivers License Number	Drivers License State
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

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

Cardholder ID Maintenance - Add Screen

Update Successful. Please be advised that changes made may not always be immediately displayed.

Account Code:


Customer Id:

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

Cardholder ID Maint

Add

View List/Delete

Upload Unassigned ID 

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.

Cardholder ID Maintenance - File Upload Screen

99 unassigned cardholder ids are present in the database.

Account Code:

Customer Id:

Upload XL file to add new unassigned cardholder ids to the database:

No file chosen

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

Submit

PREVIOUS NEXT BOTTOM OF PAGE

	Customer ID	Customer Name	Cardholder ID	Last Name	First Name	Drivers License Number	Drivers License State
<input type="checkbox"/> Delete All <input type="checkbox"/> Delete <input type="button" value="EDIT"/>	03000	TE999S 2008 ACCOUNT	123456	TEST	TEST	123412342	TN

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

Cardholder ID Maintenance - Edit Cardholder

Fields that require information are designated with an asterisk.

* Last Name:

* First Name:

Drivers License Number:

Drivers License State:

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

Submit

PREVIOUS NEXT BOTTOM OF PAGE

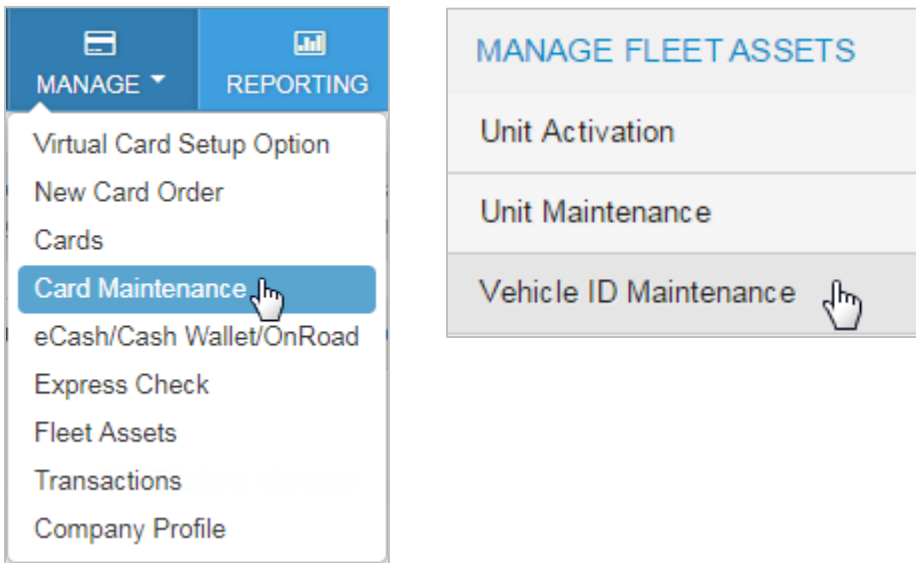
	Customer ID	Customer Name	Cardholder ID	Last Name	First Name	Drivers License Number	Drivers License State
<input checked="" type="checkbox"/> Delete All <input checked="" type="checkbox"/> Delete <input type="button" value="EDIT"/>	03000	TE999S 2008 ACCOUNT	123456	TEST	TEST	123412342	TN

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.

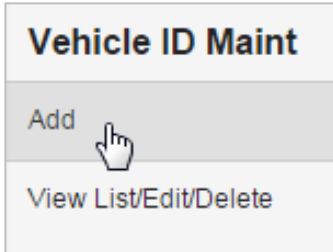
1. On the ICD home page, select **Manage > Fleet Assets > Vehicle ID Maintenance**.



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.

The screenshot shows the 'Vehicle ID Maintenance - View List' page. It features three search criteria: 'Account Code' with a dropdown menu showing 'TE999 - XYZ COMPANY', 'Customer Id' with a dropdown menu showing '03000 - COMDATA CORP UAT TEST ACCT3456', and 'Search By Vehicle Number: (optional)' with an empty text input field. A blue 'Search' button is located below the input fields.

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.

Vehicle ID Maintenance - Add Screen

Account Code:

Customer Id:

Submit **Add Additional Vehicle Numbers** **Reset All Fields** **Bottom of Page**

Fields that require information are designated with an asterisk. Fields that are static will not allow entry.

* Vehicle Number	Vehicle Id Nbr (VIN)	Vehicle Description	License Plate Number	Registration Expiration (MMYY)	Miscellaneous #1	Miscellaneous #2
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Submit **Add Additional Vehicle Numbers** **Reset All Fields** **Top of Page**

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

Vehicle ID Maintenance - Add Screen

Update Successful. Please be advised that changes made may not always be immediately displayed.

Account Code:

Customer Id:

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

	Vehicle Number	Vehicle Id Nbr (VIN)	Vehicle Description	License Plate Number	Registration Expiration	Miscellaneous #1	Miscellaneous #2
<input type="checkbox"/> Delete	2				0101		
<input type="checkbox"/> Delete	5				0101		

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

Vehicle ID Maintenance - Edit

Vehicle Number: 2

Vehicle Id Nbr (VIN):

Vehicle Description:

License Plate Number:

Registration Expiration (MMYY):

Miscellaneous #1:

Miscellaneous #2:

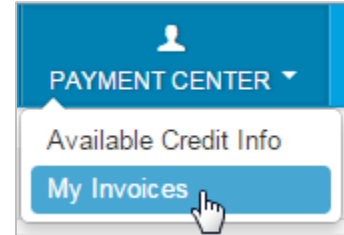
Select the **Delete** checkbox > **Submit** to remove a vehicle. You can also select **Delete All** > **Submit** to delete all vehicles in the list.

	Vehicle Number	Vehicle Id Nbr (VIN)	Vehicle Description	License Plate Number	Registration Expiration	Miscellaneous #1	Miscellaneous #2
<input checked="" type="checkbox"/> Delete	2				0101		
<input checked="" type="checkbox"/> Delete	5				0101		

Searching for an Invoice

Your invoices are available in ICD through the My Invoices feature. Anytime you need to see charges on your account, come here to view them.

1. Select **Payment Center > My Invoices**.



2. Complete each field as necessary to search for invoices and click **Get Reports**.

- **Report Type:** Select a report type from the drop-down (invoice, data, management) or select **Any Report Type** to select all reports for which you are registered.
- **Account Code:** If you have access to multiple account codes, the drop-down will display your default account code. Select a different account code if necessary.
- **Customer ID:** Select a customer ID associated with the account code or leave as **“All Customer Ids For “account code”**.
- **Start Date:** Defaults to the previous date. The drop-down contains dates for the past 14 months.
- **End Date:** Defaults to the current date. The drop-down contains dates for the past 14 months. Maximum date range of 45 days for start and end date.
- **Report Name/Code:** Defaults to **All Available Reports**. The drop-down contains all reports that match your report type.
- **Sort By, And Then:** Use these fields to sort your search results by the options provided such as account code, customer ID, or report name.

REPORT TYPE

ACCOUNT CODE

CUSTOMER ID

START DATE *

END DATE

REPORT NAME / CODE

SORT BY

AND THEN

AND THEN

GET REPORTS





















* Data available for past 14 months. Maximum range of 45 days allowed.

3. The results will contain each invoice that matches your search criteria.

Monday, January 01, 2018 - Wednesday, February 14, 2018
ANY REPORT TYPE
Account Code: MM000

SEARCH AGAIN

Page 1 of 9 **GO**

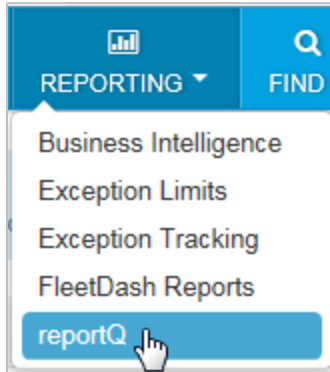
Date	Customer ID	Report
  02/14/2018	NA	CONSOLIDATED INVOICE TOTALS [CXAC0002]
  02/14/2018	NA	MISCELLANEOUS BILLING DETAIL [CXAC0009]
  02/13/2018	NA	CONSOLIDATED INVOICE TOTALS [CXAC0002]
  02/13/2018	NA	MISCELLANEOUS BILLING DETAIL [CXAC0009]
  02/10/2018	NA	CONSOLIDATED INVOICE TOTALS [CXAC0002]
  02/10/2018	NA	MISCELLANEOUS BILLING DETAIL [CXAC0009]
  02/09/2018	NA	FLEET MANAGEMENT REPORT BY CUSTID [CXAC0015]
  02/09/2018	NA	FUEL INVOICE [TSFM0004]
  02/09/2018	NA	CONSOLIDATED INVOICE TOTALS [CXAC0002]
  02/09/2018	NA	MASTERCARD PURCHASES BILLING DETAIL [CXAC0005]

Records 1 - 10 85 Reports Found

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**.



- 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.

Close ReportQ

Quick Reports

Back to ReportQ Home

Administration

- Account Spend by Month
- Card Listing Report
- Exception Listing
- ID Report
- MCC Summary Report
- Corporate Payments Account Spend Report
- MasterCard Rebates Report
- MasterCard Dispute Report

Cardholder

- Cardholder Activity Report General
- Cardholder Group Summary
- Cardholder Group Summary - Enhanced
- Cardholder Spend Trend
- Cardholder Summary
- Cardholder Usage Report General
- Product Summary
- Transaction Listing

Debit

- eCash Transaction Activity - All Activity

Proprietary

- TMR Individual Transaction Price Detail
- TMR Individual Transaction Price Summary

SmartQ RFID

Purchasing/T&E

- T&E Cardholder Activity Summary
- T&E Cardholder Airline Activity
- T&E Cardholder Car Rental
- T&E Cardholder Hotel Activity
- Easy Savings Report

Dashboard

- Corporate Dashboard

Express Check

Fleet

- Cardholder Activity - Fleet
- Cardholder ID Report
- F Save Report
- Fuel and Maintenance MCC Report
- Fuel Purchase Summary by Customer ID
- Fuel Purchase Summary by POS
- Fuel Purchase Summary by POS & Cust ID
- Fuel Purchase Summary by Vehicle
- MPG Report
- Vehicle Listing
- Vehicle Report

Healthcare

Merchant

- MCC Description Summary
- Merchant Fuel Chain Summary
- Merchant Location Activity
- Merchant Spend Trend
- Merchant Summary

Vendor Enrollment

ePayables

- ePayables Virtual Card Listing
- ePayables Transaction Listing
- ePayables Outstanding Card Report
- ePayables Invoice Detail Report
- ePayables Reconciliation Report
- ePayables Peer Benchmarking

Virtual Card

Demo Reports

- Account Spend by Month
- Card Listing Report
- Merchant Summary
- TMR Individual Transaction Price Detail
- Transaction Listing

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