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P-CARD USER MANUAL

MAINTAIN P-CARDS OR PROXY VERIFIERS

INTRODUCTION

The **Maintain CC** screen allows you to:

- Add a new P-Card that you have issued to a user.
- Re-assign a P-Card from one user to another.
- Add proxy verifiers to a specific P-Card so they can verify transactions if the card holder is not available to do so.
- Update a card holder's/ user's profile (as you would when you edit an existing P-Card user).

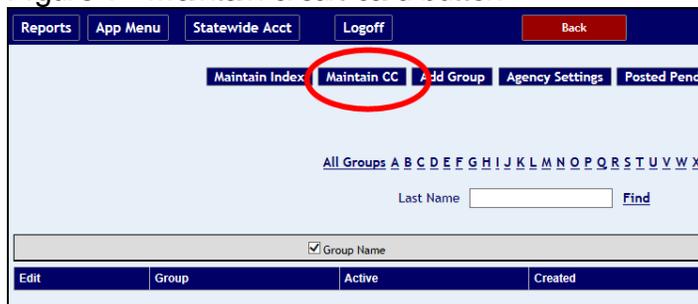
When updating P-Cards and card holders:

- Make sure you do not enter a duplicate card number for a user. Maintain CC will not warn you if the card number already exists.
- Do not make a card inactive (unchecking the Active check box) until all transactions come from the bank and are processed in the application, even if the card is lost or stolen. The **Active** check box allows bank transactions to populate in the application, and allows verifiers and approvers to process the transactions of that card. Once all transactions have been verified and approved, you can change the card to **Inactive**.
- If a card exists for a proxy user but the proxy user was not set up properly, and the card is then marked **Inactive**, P-Card reports may not accurately report the actual card holder.

MAINTAIN CC SCREEN OVERVIEW

1. On the P-Card main menu, select **Admin**, and then click **Maintain CC**.

Figure 1 - Maintain credit card button



2. A list of your agency's credit cards and the associated card holder will be displayed. The list can be sorted ascending/descending by clicking the column headings (**CC#**, **Card Holder**, etc.) The column headings include:
 - **CC#** – the last ten digits of the P-Card.
 - **CCType** – WFMC (Wells Fargo MasterCard) or BOAV (Bank of America VISA)
 - **Active** – The **Active** check box makes the card active in order to populate bank transactions into the application, and allow verifiers and approvers to process the transactions of that card.
 - **Description** – A description you entered when setting up a new user.
 - **Card Holder** – The name of the card holder. A card holder that is inactive in the application is indicated in red. NOTE: If *both* the card and the card holder are inactive, the card holder name will not be in red.

Figure 2 - Maintain credit card screen

CC#	Active	CCType	Description	Card Holder
05	<input checked="" type="checkbox"/>	WFMC		PELE JMAS (inactive)
110	<input checked="" type="checkbox"/>	BOAV		SHIP
110	<input checked="" type="checkbox"/>	BOAV	re-issued card	MUSC
110	<input checked="" type="checkbox"/>	BOAV		WHIT
120	<input checked="" type="checkbox"/>	BOAV		STRA
120	<input checked="" type="checkbox"/>	BOAV		EVER
120	<input checked="" type="checkbox"/>	BOAV		BENJ

CC# Active Type BOAV

Card Holder

Description

Proxy Verifiers

ADD A NEW P-CARD

1. Click the card number in the **CC#** column to display the card details.
2. Enter the new card number in the **CC#** field and press ENTER. **Do not** enter a duplicate card number and make it active. Maintain CC will not warn you if the card number already exists for that user.
3. Check the **Active** check box and make sure there is a check mark after you do so. If the card is not active, users will not see their transactions in the application.
4. Select the card **Type**, and then select the **Card Holder** from the drop down menu.
5. Enter a **Description** as needed (40 alphanumeric characters. Do not use special characters or symbols, including **&**, **'**, **“**, **<**, and ****).
6. Click **Save**.
7. You can verify that the card saved to the correct user by clicking the **Back** button at the top of the screen, selecting the user's name in the Admin screen, and checking the card information.

ASSIGN A P-CARD TO A DIFFERENT CARD HOLDER

1. Click the card number in the **CC#** column.
2. Click the **Card Holder** drop-down and select a new card holder name.
3. Make sure the **Active** check box is checked.
4. To add a description, enter or edit the **Description** field (40 alphanumeric characters. Do not use special characters or symbols, including **&**, **'**, **“**, **<**, and ****).
5. Click **Save**.

Figure 3 - P-Card details

CC#	Active	CCType	Description	Card Holder
03	✓	WFMC		PETER
110	✓	BOAV		MUSGR
110	✓	BOAV	re-issued card	MUSGR
110	✓	BOAV		WHITW
120	✓	BOAV		STRAT
120	✓	BOAV		EVERIL
120	✓	BOAV		BENJAJ

CC# 1105 Active Type BOAV

Card Holder MUSGR

Description re-issued card

Save

Proxy Verifiers

Add

Proxy Verifiers

ADD OR DELETE PROXY VERIFIERS

You can view, add, or delete proxy verifiers of a card in the **Proxy Verifiers** section. Click the card number in the **CC#** column to display the card details. [Click here to view the Adding or Deleting a Proxy Verifier documentation](#). NOTE: **Maintain CC** assigns proxy verifiers to a *card holder/card number*. When you edit a user's profile, you add *proxy cards* to that *user*. If an agency is using approval by location, they should take care to assign proxy verifiers from the same location as the person for whom they are verifying.

1. Click the card number in the **CC#** column to display the card details.
2. Click the **Proxy Verifiers** drop down menu and select the name of a Proxy Verifier. (Since any user can be a proxy verifier, all user names will be in this list)
3. Click **Add**.
4. To remove a proxy verifier, click **Del** next to the name.

UPDATE THE CARD HOLDER PROFILE

1. To update a card holder's information (e.g., their default PCA or verifier or approver roles), click the user name in the **Card Holder** column.

Figure 5 - Maintain Card Holder

CC#	Active	CCType	Description	Card Holder
03	✓	WFMC		PETER
110	✓	BOAV		SHIPM
110	✓	BOAV	re-issued card	MUSGR
110	✓	BOAV		WHITM
120	✓	BOAV		STRAT
120	✓	BOAV		EVERIL
120	✓	BOAV		BENJAJ

2. The card holder's profile screen will open just as it would when you edit an existing user or add a new user. Follow the [documentation for setting up a new user](#) to change a user's configuration.

Figure 6 - User Profile

CC#	Type	Act	Description
12	BOAV	<input type="checkbox"/>	
11	BOAV	<input checked="" type="checkbox"/>	re-issued card

3. Click a card number to return to the **Maintain CC** screen.