



Works Tip of the Week



Tip of the Week - 4/6/2007

When reporting a card as lost or stolen, there are three steps to remember:

1. Contact your card issuer's customer service and report the card as lost or stolen; they will generate a replacement account. **call 888/449-2273**
2. Deactivate the card within the application, marking it as lost or stolen.
3. Assign the card to its user and card profile when it appears within the application.

It is not recommended to simply deactivate the account and issue a new card request, because the balance will not have transferred to the new account and the lost or stolen account may not be monitored for fraudulent activity.

:: **Step One: Contact your card issuer to report the card as lost or stolen**

Contact your card issuer's Customer Service department. They may ask about how or when the card was lost or stolen. Also, they will issue a replacement card account and may transfer the outstanding balance to the new card.

:: **Step Two: Deactivate the card within the application, marking it as lost or stolen**

Click **Administration - Card Program - Cards** in the left navigation bar. A list of your cards will display in the List section. Select your card and click the **Deactivate** button. Use the **Report as Lost Stolen** option. This will remove the card from your list of active cards, although transactions will remain in the workflow and historical reporting.

The screenshot shows the 'Administration - Card Program - Cards' page. A table lists various cards with columns for Name, ID, and Program. The card 'WILSON, WADE' is selected. Below the table, the 'Deactivate' button is highlighted in red. The card details for 'WILSON, WADE' are shown, including Card Name, Billing Accounts, Credit Limits, and Default Allocation.

Filters	Name	ID	Program
	LARKIE EASTMAN	4747	Standard Purchasing: \$175k Cr
	PHILLIP DUGANS	4861	Marketing: CL: \$10k, STL: \$2,50
	RHONDA DUNLOP	3280	Standard Purchasing: \$175k Cr
	RYAN PRUENADA	9988	Standard Purchasing: \$75k Cr
	THOMAS SEINS	8198	Marketing: CL: \$10k, STL: \$2,50
	PAT SUMARI	0797	Marketing: CL: \$10k, STL: \$2,50
	SUZANNA WILLIAMS	9765	Marketing: CL: \$10k, STL: \$2,50
	ANTHONY SOPRANO	2276	Standard Purchasing: \$175k Cr
	CURT VILLAREAL	3461	Corporate Default: CL: 70k, SP
	WADE WILLOW	8095	CL: \$10k / CASH: 0 / DT: 0 / D
	WAYNE VAN HORN	4860	Standard Purchasing: \$175k Cr
	WAYNE V VAN HORN	3426	Corporate Default: CL: 70k, SP
	ELLEN WESSON	8747	Corporate Default: CL: 70k, SP
	WILSON, WADE	3474	Standard Purchasing: \$175k Cr

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Wilson, Wade WADE WILSON 3474 Available Credit: \$175,000.00 Available Funds: \$175,000.00

General Cardholders Memo Address

Card Name: Wilson, Wade

Billing Accounts: FRIENDLY BUSINESS CO Credit Limits: \$175,000.00

Primary Cardholder: Wilson, Wade Discretionary Funds: \$175,000.00

Incremental Buffer: 0%

Default Allocation: GL Assistant

Department Expense Code Project Sub-Project

View Card Information Save Replace **Deactivate** Authorization Log

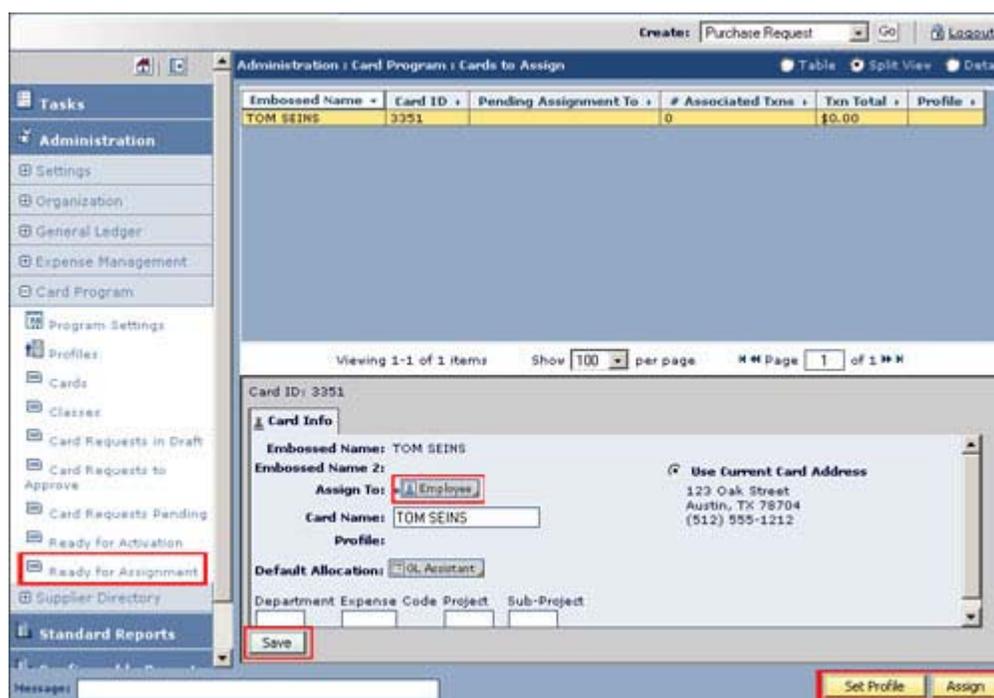
:: Step Three: Assign the card to its User and Card Profile when it appears in the application

The day after your card issuer creates a replacement account, the card will appear in your Ready for Assignment queue.

Click **Administration - Card Program - Ready For Assignment** in the left navigation bar. The cards that are ready for assignment will display in the List section. If you have a card that needs to be assigned, select it.

In the Detail section, click the **Employee** button to select which user the card should be attached to. Then, enter the **Card Name**, which is usually the first and last name of the cardholder. Click **Save**.

Next, use the **Set Profile** button to attach it to the appropriate card profile and click **Finish**. When ready, click the **Assign** button to remove them from this queue.



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