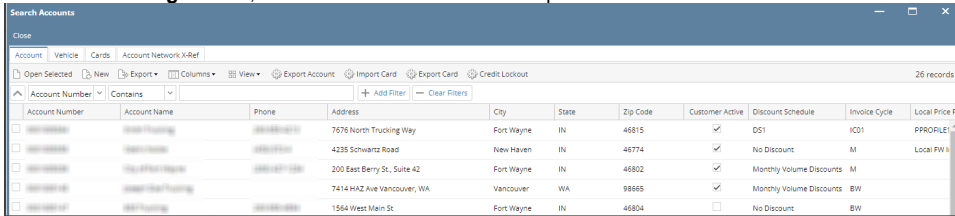


How to Lock and Unlock Card Accounts

Via Credit Lockout

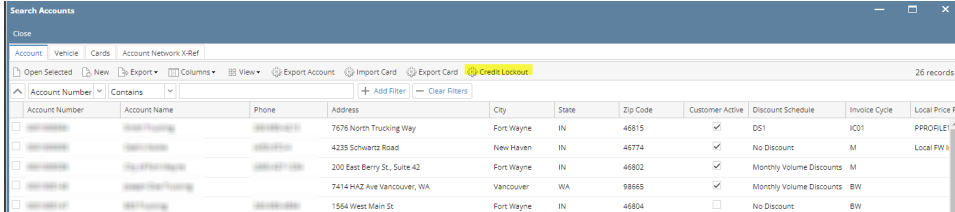
1. From **Card Fueling** module, click **Card Accounts**. This will open the **Account** search screen.



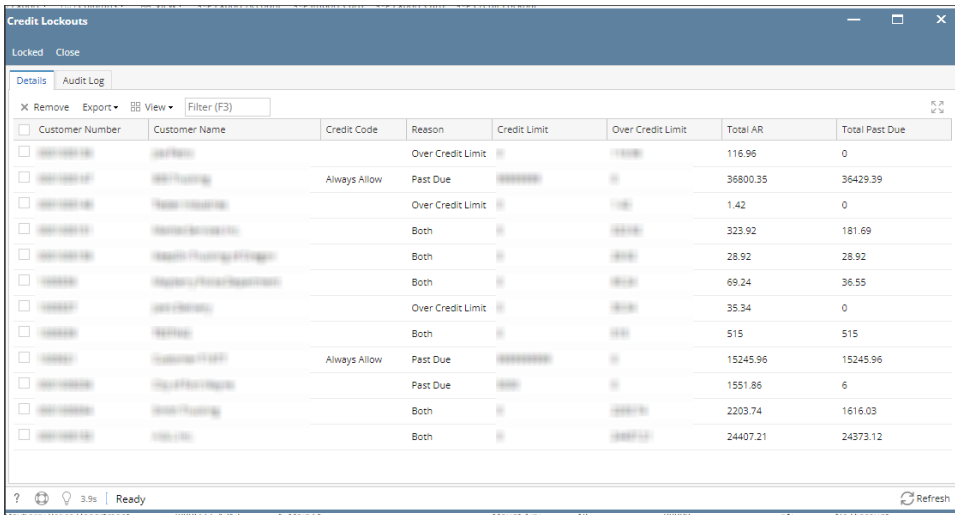
The screenshot shows the 'Search Accounts' window with a table of card accounts. The table has columns for Account Number, Account Name, Phone, Address, City, State, Zip Code, Customer Active, Discount Schedule, Invoice Cycle, and Local Price. The 'Credit Lockout' button is highlighted in the toolbar.

Account Number	Account Name	Phone	Address	City	State	Zip Code	Customer Active	Discount Schedule	Invoice Cycle	Local Price
1000000001	1000000001	1000000001	7676 North Trucking Way	Fort Wayne	IN	46815	✓	DS1	IC01	PROROLE
1000000002	1000000002	1000000002	4238 Schwartz Road	New Haven	IN	46774	✓	No Discount	M	Local PW
1000000003	1000000003	1000000003	200 East Berry St, Suite 42	Fort Wayne	IN	46802	✓	Monthly Volume Discounts	M	
1000000004	1000000004	1000000004	7414 HAZ Ave Vancouver, WA	Vancouver	WA	98665	✓	Monthly Volume Discounts	BW	
1000000005	1000000005	1000000005	1564 West Main St	Fort Wayne	IN	46804	✗	No Discount	BW	

2. In **Account** search screen, click **Credit Lockout** toolbar button. this will open the **Credit Lockouts** screen.
Credit Lockouts screen contains all Card Accounts which status are either Past Due, Exceeds Credit Limit, or Both.



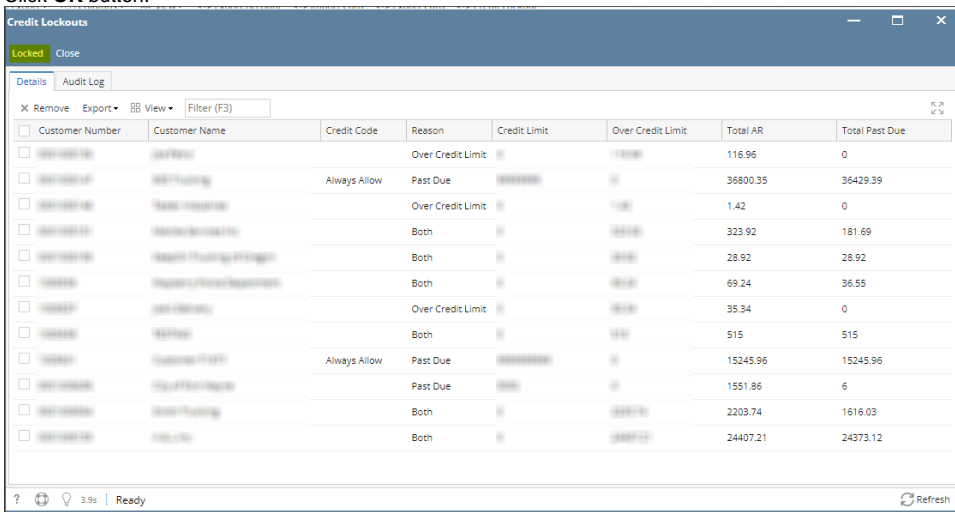
This screenshot is identical to the previous one, but the 'Credit Lockout' button in the toolbar is highlighted in yellow.



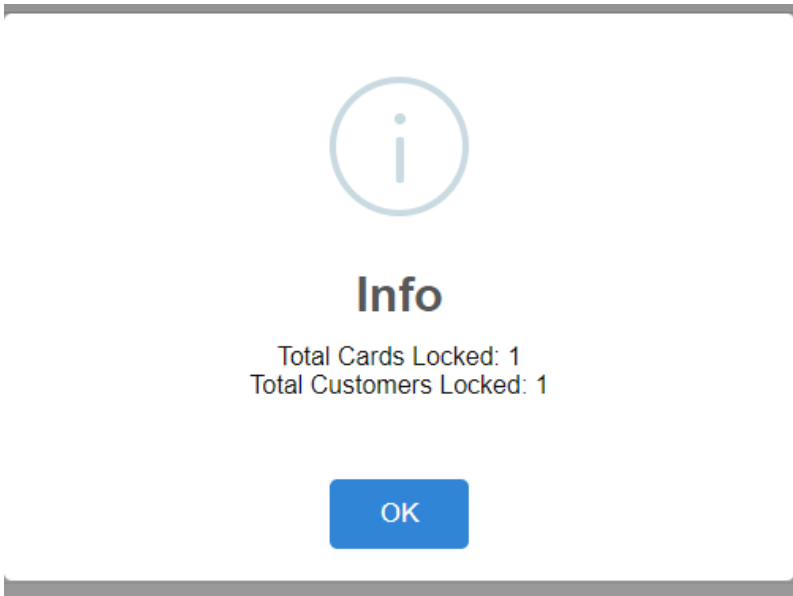
The screenshot shows the 'Credit Lockouts' window with a table of locked accounts. The table has columns for Customer Number, Customer Name, Credit Code, Reason, Credit Limit, Over Credit Limit, Total AR, and Total Past Due. The 'Locked' button is highlighted in the toolbar.

Customer Number	Customer Name	Credit Code	Reason	Credit Limit	Over Credit Limit	Total AR	Total Past Due
1000000001	1000000001	1000000001	Over Credit Limit	116.96	0		
1000000002	1000000002	Always Allow	Past Due	36800.35	36429.39		
1000000003	1000000003		Over Credit Limit	1.42	0		
1000000004	1000000004		Both	323.92	181.69		
1000000005	1000000005		Both	28.92	28.92		
1000000006	1000000006		Both	69.24	36.55		
1000000007	1000000007		Over Credit Limit	35.34	0		
1000000008	1000000008		Both	515	515		
1000000009	1000000009	Always Allow	Past Due	15245.96	15245.96		
1000000010	1000000010		Past Due	1551.86	6		
1000000011	1000000011		Both	2203.74	1616.03		
1000000012	1000000012		Both	24407.21	24373.12		

3. Select **CustomerCard** to be locked then click **Locked** toolbar button.
Card Lock message will be displayed.
Click **OK** button.



This screenshot is identical to the previous one, but the 'Locked' button in the toolbar is highlighted in yellow.



- Verify locked card, it should not appear on the **Credit Lockouts** screen anymore. Verify Card Account, Card Locked checkbox should be checked.

Credit Lockouts Locked Close

Details Audit Log

X Remove Export View Filter (F3)

<input type="checkbox"/>	Customer Number	Customer Name	Credit Code	Reason	Credit Limit	Over Credit Limit	Total AR	Total Past Due
<input type="checkbox"/>	0000000000	Local Bank		Over Credit Limit	1116.96	1116.96	116.96	0
<input type="checkbox"/>	0000000000	0000000000	Always Allow	Past Due	36800.35	36800.35	36800.35	36429.39
<input type="checkbox"/>	0000000000	0000000000		Over Credit Limit	1.42	1.42	1.42	0
<input type="checkbox"/>	0000000000	0000000000		Both	323.92	323.92	323.92	181.69
<input type="checkbox"/>	0000000000	0000000000		Both	28.92	28.92	28.92	28.92
<input type="checkbox"/>	0000000000	0000000000		Both	69.24	69.24	69.24	36.55
<input type="checkbox"/>	0000000000	0000000000		Over Credit Limit	35.34	35.34	35.34	0
<input type="checkbox"/>	0000000000	0000000000		Both	515	515	515	515
<input type="checkbox"/>	0000000000	0000000000	Always Allow	Past Due	15245.96	15245.96	15245.96	15245.96
<input type="checkbox"/>	0000000000	0000000000		Past Due	1551.86	1551.86	1551.86	6
<input type="checkbox"/>	0000000000	0000000000		Both	2203.74	2203.74	2203.74	1616.03
<input type="checkbox"/>	0000000000	0000000000		Both	24407.21	24407.21	24407.21	24373.12

? 3.9s Ready Refresh

Account - 0000000000 - 0000000000

New Save Delete Search Undo Invoice Cycle Price Rule Group Customer Close

Details Invoice Format Quote Cards Vehicles Driver Pin Departments Miscellaneous Purchase Orders Audit Log

+ Add + Open X Remove Add To Encoding De-Activate Card Locked Unlocked Export View Filter (F3) 1 Total Record(s)

<input type="checkbox"/>	Network ID	Card Number	Card Description	Card Pin Number	Card Locked	Card Type	Entry Code	Departm
<input type="checkbox"/>	0000000000	0000000000	0000000000		<input checked="" type="checkbox"/>			

Via Card Account Detail Screen

- From **Card Fueling** module, click **Card Accounts**. This will open the **Account** search screen.

Search Accounts Close

Account Vehicle Cards Account Network X-Ref

Open Selected New Export Columns View Export Account Import Card Export Card Credit Lockout 26 records

Account Number Contains + Add Filter Clear Filters

Account Number	Account Name	Phone	Address	City	State	Zip Code	Customer Active	Discount Schedule	Invoice Cycle	Local Price
0000000000	0000000000	0000000000	7676 North Trucking Way	Fort Wayne	IN	46815	<input checked="" type="checkbox"/>	DS1	IC01	FFRORILEY
0000000000	0000000000	0000000000	4235 Schwartz Road	New Haven	IN	46774	<input checked="" type="checkbox"/>	No Discount	M	Local Price
0000000000	0000000000	0000000000	200 East Berry St, Suite 42	Fort Wayne	IN	46802	<input checked="" type="checkbox"/>	Monthly Volume Discounts	M	
0000000000	0000000000	0000000000	7414 HAZ Ave Vancouver, WA	Vancouver	WA	98665	<input checked="" type="checkbox"/>	Monthly Volume Discounts	BW	
0000000000	0000000000	0000000000	1564 West Main St	Fort Wayne	IN	46804	<input type="checkbox"/>	No Discount	BW	

2. Select **Card Account** then click **Open Selected** toolbar button. The **Card Account** detail screen will be displayed.
[blocked URL](#)

Account - 0001-1 CF Test

New Save Delete Search Undo Invoice Cycle Price Rule Group Customer Close

Details Invoice Format Quote **Cards** Vehicles Driver Pin Departments Miscellaneous Purchase Orders Audit Log

+ Add Open X Remove Add To Encoding De-Activate Card Locked Unlocked Export View Filter (F3) 0 Total Record(s)

Network ID *	Card Number *	Card Description	Card Pin Number	Card Type	Entry Code	Card Locked	Departm
<input checked="" type="checkbox"/> CF Network	Test Card	Test Card Description				<input type="checkbox"/>	
<input type="checkbox"/>						<input type="checkbox"/>	

3. Click **Locked** grid button to lock all existing cards on **Account**. Or Click on the checkbox under **Card Locked** column to lock specific card. Then click **Save** toolbar button.

Account - 0001-1 CF Test

New Save Delete Search Undo Invoice Cycle Price Rule Group Customer Close

Details Invoice Format Quote **Cards** Vehicles Driver Pin Departments Miscellaneous Purchase Orders Audit Log

+ Add Open X Remove Add To Encoding De-Activate Card Locked Unlocked Export View Filter (F3) 0 Total Record(s)

Network ID *	Card Number *	Card Description	Card Pin Number	Card Type	Entry Code	Card Locked	Departm
<input checked="" type="checkbox"/> CF Network	Test Card	Test Card Description				<input checked="" type="checkbox"/>	
<input type="checkbox"/>						<input type="checkbox"/>	

4. Unlock all cards on **Account** by clicking on the **Unlocked** grid button. Or unlock specific card on **Account** by unchecking the checkbox under **Card Locked** column. Then click **Save** toolbar button.

Account - 0001-1 CF Test

New Save Delete Search Undo Invoice Cycle Price Rule Group Customer Close

Details Invoice Format Quote **Cards** Vehicles Driver Pin Departments Miscellaneous Purchase Orders Audit Log

+ Add Open X Remove Add To Encoding De-Activate Card Locked Unlocked Export View Filter (F3) 0 Total Record(s)

Network ID *	Card Number *	Card Description	Card Pin Number	Card Type	Entry Code	Card Locked	Departm
<input checked="" type="checkbox"/> CF Network	Test Card	Test Card Description				<input type="checkbox"/>	
<input type="checkbox"/>						<input type="checkbox"/>	