

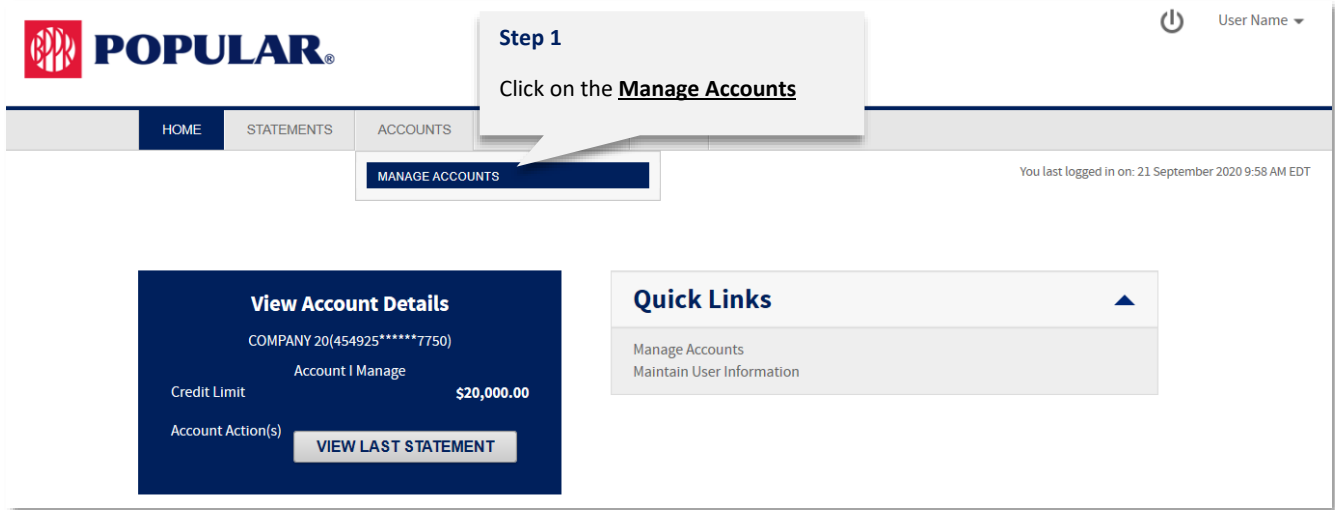
Commercial Credit Card Manager (CCCM)

Close Card and Request New Card (Administrator) – Quick Guide Reference

As an Administrator you will have access to the corporate account information as well as all the individual card accounts. You will be able to view the corporate account but will not be able to make any changes. As an Administrator you will be able to close an existing card and request a new card. For more information, please see the CCCM Administrator Guide.

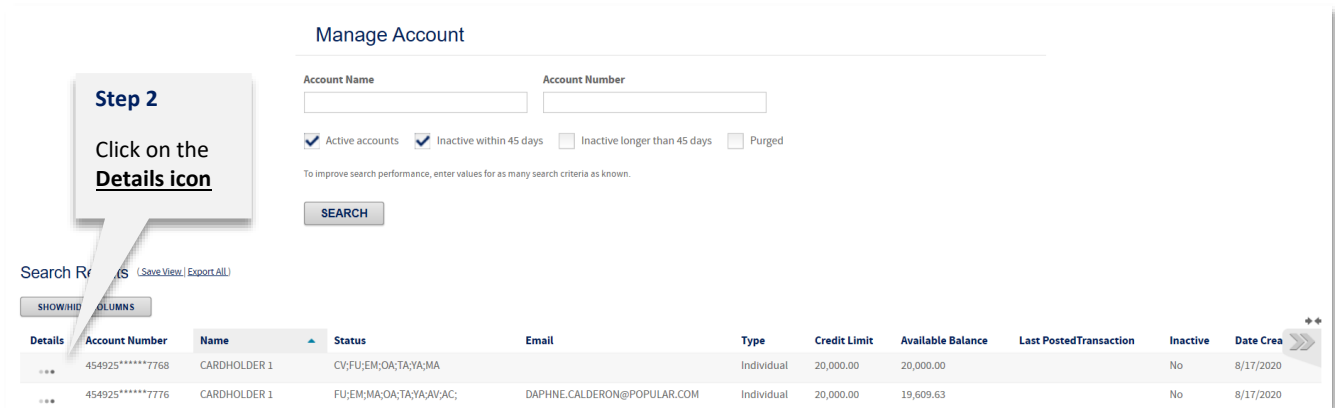
Steps to Close Card

Step 1: Login into CCCM (commercialcards.popular.com), on the Home Page, click on the **Accounts** menu and select **Manage Accounts**.



Step 2: You can search for the account you wish to view or simply click **Search** and CCCM will bring all the accounts registered to your user. Click the **Details icon** on the account you wish to view.

NOTE: When making partial searches include an asterisk (*) at the end of the search value.



HINT: The Status column presents the status codes for that account. Please reference the status code table at the end of this Guide.

Step 3: The account screen will appear. In order to have access to make changes you will need the advanced administrator functionalities.

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Account Management for CARDHOLDER 1

Show Program Change Requests [+] (0)

***Required field**

Note: Yellow indicates field is updated real-time

Card Information

Account Number
454925*****7768

Cardholder Name: [?]
CARDHOLDER 1

Business Name on the Card: [?]
COMPANY 20

Step 4: Scroll down to the Account Status section. Select **CLV1 – Voluntary Closure** from the drop-down menu.

Account Status

Number of cards outstanding: [?]
1 [Order replacement card](#)

Account status: [?]
Select action
CLV1 -- Voluntary Closure

Step 4
Select **CLV1 – Voluntary Closure**

Step 5: Scroll down to the end of the page and click **Submit**.

Monthly: 0 0

Step 5
Click **Submit**

SUBMIT **SUBMIT WITH NOTE** [?] [Cancel](#)

Steps to Request New Card

Step 1: Login into CCCM (commercialcards.popular.com), on the Home Page, click on the **Accounts** menu and select **Manage Accounts**.

Step 1
Click on the **Manage Accounts**

POPULAR®

HOME STATEMENTS ACCOUNTS

MANAGE ACCOUNTS

You last logged in on: 21 September 2020 9:58 AM EDT

View Account Details
COMPANY 20(454925*****7750)
Account I Manage
Credit Limit **\$20,000.00**
Account Action(s) **VIEW LAST STATEMENT**

Quick Links
Manage Accounts
Maintain User Information

Step 2: Click on **Add New Account**.

Manage Account

ADD NEW ACCOUNT

Account Name Account Number

Account Status
 Active accounts Inactive within 45 days Inactive longer than 45 days Purged

To improve search performance, enter values for as many search criteria as known.

SEARCH

Step 2
Click on **Add New Account**

Step 3: If you have access to multiple accounts, choose the account where you will be adding the new account. If you do not have access to multiple accounts skip to Step 4 to continue.

Select Location for New Account

Select Unit

Unit Hierarchy Sort by: Unit Name Unit Number

COMPANY 20 TEST (01003891) [+]

COMPANY 21 (01003892) [+]

Step 4: Complete the demographic information requested. Fields with an asterisk (*) are required.

- Cardholder Name*: requires an asterisk between the first and last name. Ex. Jane*Doe
- Email Address
- Work Phone
- Mobile Phone*
- Date of Birth*
- Social Security Number*

[← Back to results](#)

Add New Account for COMPANY 20 TEST(01003891)

*Required field

Note: Yellow indicates field is updated real-time

Card Information

Account Number

Cardholder Name: [?] *

Address Information

Address Code: 01

Email Address: [?]

Phone Information

Work Phone: [?]

Mobile Phone: [?] *

Account Holder Information

Date of birth: [?] *

Month Day Year

Social Security Number [?] *

Step 5: Complete the credit limit information.

- a. Add the credit limit you are establishing for the account. If the account shares the credit limit amongst all the cardholders include the total approved amount. If the account has been established to manage separate limits per card include the desired amount.
- b. Optional: Add additional limits to the card based on usage. A user can limit the use of the card based on total amount spent and/or on number of transactions allowed. These can be established as cycle, daily, or monthly limits. For example, if it is established that the card can only make 5 transactions in a cycle once that threshold is met the card will decline until the next cycle regardless of availability. **If you choose no to use this function leave values as zeros.**

Authorization

RESET AUTHORIZATION VALUES [?]

Card Limits:
If your product is a Visa Business product, where all the cardholders share the credit line, and your intention is to assign and manage separate credit card limits, in order to do so, you must have opted-in on your Administrator Designation Form. If you opted-in to manage separate lines, mid-cycle payments (payments made before the cycle closes and a due date is notified) must be processed at the individual card level to provide availability for both, the individual card's segregated threshold and account level balance. For more information call Customer Support at 787-773-3081 or 1-877-773-3081 or the Business Banking Center at 787-756-3939.

Account option set: [?] **Step 5a**
00001 **Add Credit Limit**

Credit Limit [?] * **Step 5b**
0
Optional:
Add cycle limits by amount and/or number of transactions. These can be established as cycle, daily, or monthly limits.

Cycle Limits:

	Amount:	# of Transactions:
Cycle: [?]	0	0
Daily: [?]	0	0
Monthly: [?]	0	0

Step 6: Optional - Complete the MCC Group information. **If not establishing limits, leave section as is.**

Merchant Category Codes (MCCs) indicates the category of the merchant from which a transaction is made (from a Hotel, Airline, Dining, etc.). The MCCs are defined at each merchant POS. CCCM has pre-established MCC Groups (MCCG) that administrators can use to limit the kind of transactions their individual cardholders can make.

- a. Choose an MCC Group from the drop-down list.
- b. Choose whether the MCC Group will be included for the cardholder or excluded. For example, if the cardholder should have access to Dining transactions only, choose the Dining category from the first drop-down menu and choose Include from the second drop-down menu.
- c. Optional: Add additional limits to the selected MCC Group for the card based on usage. A user can limit the use of the card based on total amount spent and/or on number of transactions allowed for that specific MCC Group. These can be established as cycle, daily, or monthly limits. For example, if it is established that the card can only make 5 transactions in a cycle once that threshold is met the card will decline until the next cycle regardless of availability. **If you choose no to use this function leave values as zeros.**

MCC Group Authorizations

ADD MCC GROUP

RESET AUTHORIZATION VALUES

If your product is a Visa Business product, where all the cardholders share the credit line, and your intention is to assign and manage separate credit card limits, in order to do so, you must have opted-in on your Administrator Designation Form. If you opted-in to manage separate lines, mid-cycle payments (payments made before the cycle closes and a due date is notified) must be processed at the individual card level to provide availability for both, the individual card's segregated threshold and account level balance. For more information call Customer Support at 787-773-3081 or 1-877-773-3081 or the Business Banking Center at 787-756-3939.

MCC Group option set: [?]

00002

Step 6a

Choose a pre-defined **MCC Group**

MCC Group 1

Group: [?]*

CORP_AVAIL - CHECK CORP AVAIL ONLY

Step 6b

Choose if the Group will be **included or excluded** for the cardholder

Action: [?]*

Include

Cycle Limits:

Amount:

of Transactions:

Cycle: [?]
0 0

Daily: [?]
0 0

Monthly: [?]
0 0

Step 6c

Optional:

Add cycle limits for the MCC Group by amount and/or number of transactions. These can be established as cycle, daily, or monthly limits.

Step 7: Click **Submit**.

Monthly: [?]
0 0

Step 7

Click **Submit**

SUBMIT

SUBMIT WITH NOTE

[?] [Cancel](#)

Account Status Codes

Code	Code Name	Description
CL	Closed	The account is closed.
FR	Fraud	Confirmed fraud has occurred on the account.
OL	Over limit	The account is over limit.
PD	Past Due	The minimum payment was no made on the account by the due date.
RD	Reissue Decline	No cards will be reissued after the current card expires.

If you would like advanced administrator functionalities, such as managing individual card limits-or for additional information you may contact the Business Banking Center at 787-756-3939 or 1-855-756-3939, Monday to Friday from 8AM to 6PM and Saturday from 8AM to 5PM.