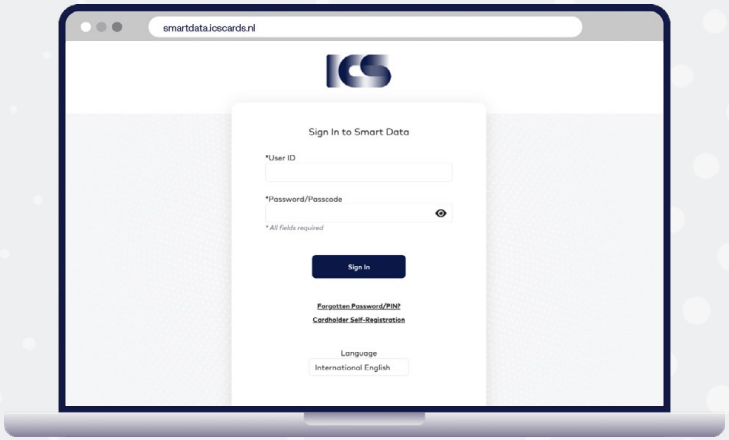
International
Card
Services

ICS Payment Control

A **step-by-step user guide**
for Company Programme Administrators



Part 5
Setup: Purchase Templates

Overview

A **Purchase Template** is a **predefined configuration** used for Virtual Card requests. It brings together **Purchase Types (MCCs), Custom Data Fields, and Payment Controls** to ensure that each request meets the required criteria. Purchase Templates help streamline and standardize Virtual Card requests for specific expense types, ensuring they comply with company policies and requirements.

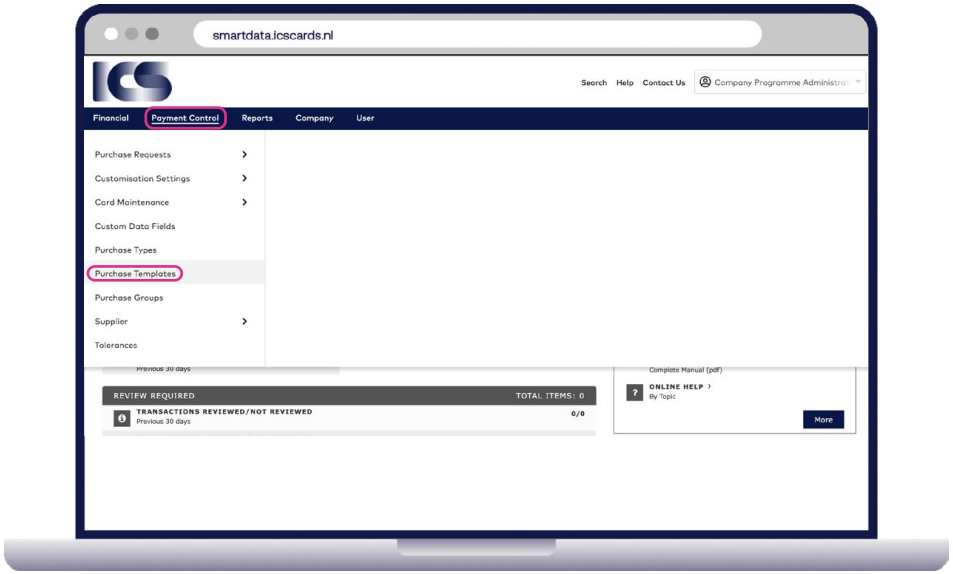
Once the Purchase Template is created and connected to its authorized users and user groups, requestors can fill in this Purchase Template to request a Virtual Card.

In this chapter you will learn how to:

- Create and edit a Purchase Template
- Enter template details
- Add Payment Controls

Getting started

Go to **Payment Control** > **Purchase Templates**.



Entering Purchase Template details

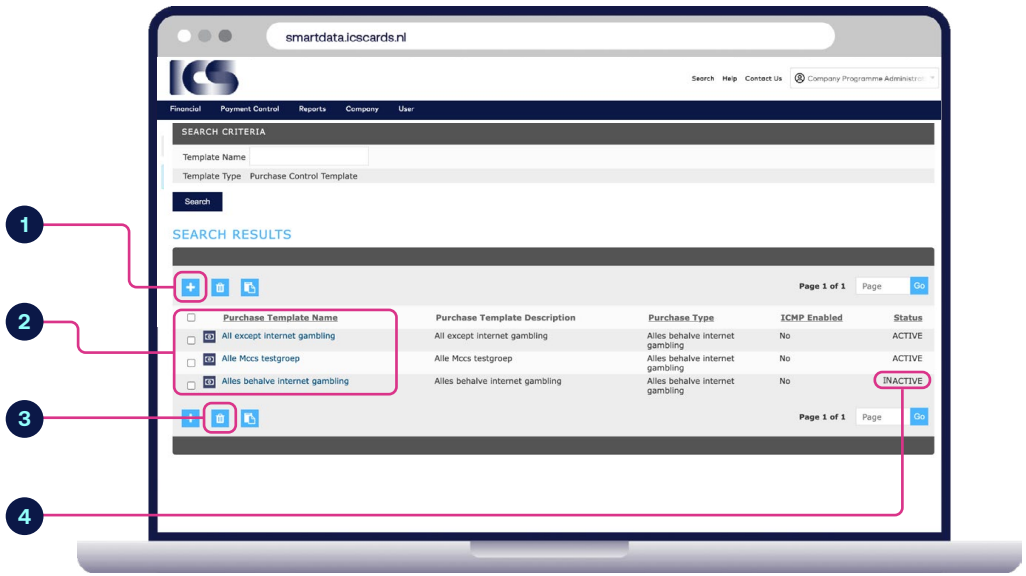
1. Click the **plus** **icon** to create a new Purchase Template.

To edit:

2. Click on the **purchase template name** to edit the details.

To delete:

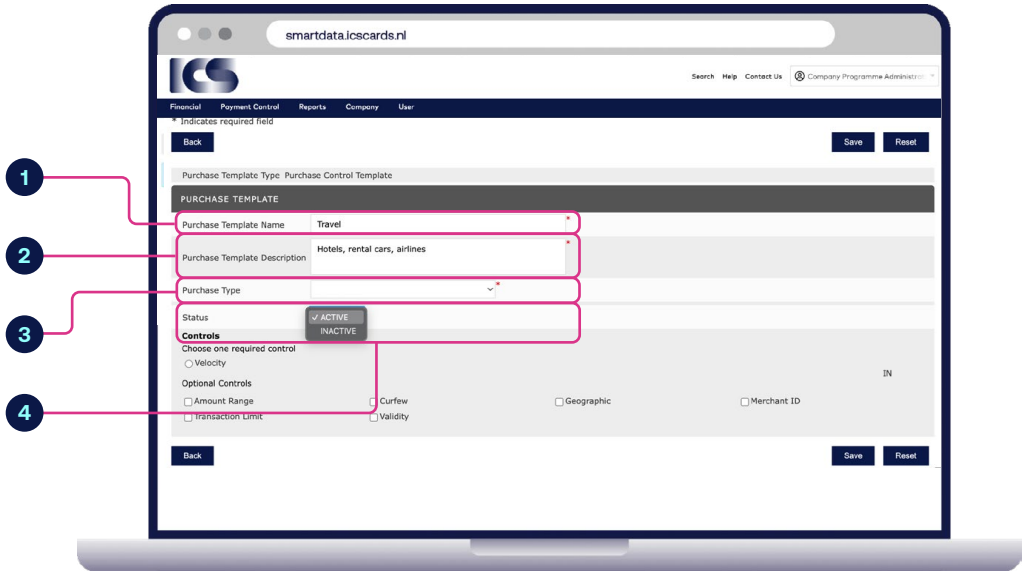
3. Click the **trash** **icon**.
4. Deleted templates are marked **Inactive**, not fully removed.



Tip: Move inactive templates to the bottom of the list by adding 'ZZZ' to the start of the description.

Entering Purchase Template details

1. **Template name**: Give the template a clear name (e.g., “Travel Template”).
2. **Description**: Add a short description for reference.
3. **Purchase Type**: Choose the Purchase Type that applies to this template. This determines for which MCCs the Virtual Card can be used.
4. **Status**: Choose **Active** or **Inactive**.



Adding Payment Controls

Add the Payment Controls that match your company policies.

Velocity Control refers to the ability to restrict the number and/or value of transactions a card can perform within a specific timeframe.
This will set the:

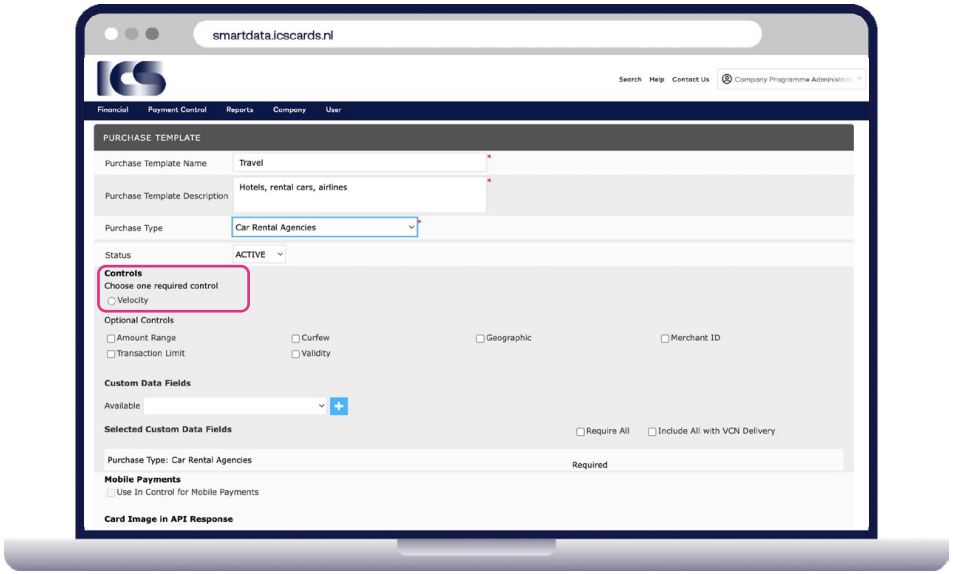
- Frequency (daily, monthly, weekly, quarterly, yearly, continuous).
- Cumulative limit.
- Maximum number of transactions.

After setup, these controls are fixed when requesting a Virtual Card.

An Example:

Frequency:	Monthly
Cumulative limit:	€1000
Maximum number of transactions:	0

This means that the Virtual Card can be used for **unlimited transactions** with a spending limit of **€1000** per month.



Note: Payment Controls are settings applied to a Purchase Template. Their parameters must be defined when requesting a Virtual Card. These controls specify how, where, and when the card can be used to ensure compliance with company policies. Once the card is issued, the controls are enforced on every transaction, adding security and ensuring proper usage.

Optional controls:

Amount Range: Minimum and maximum amount allowed for each transaction.

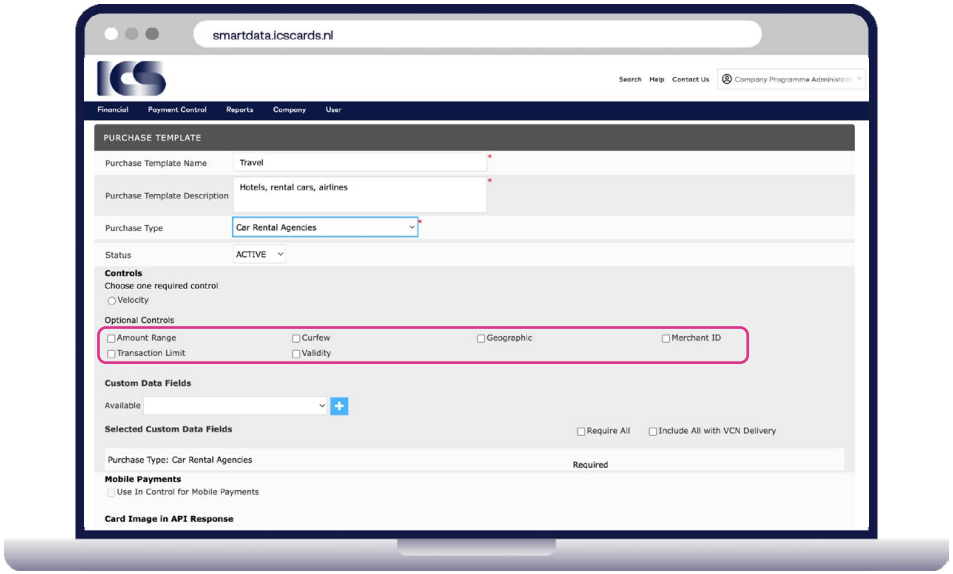
Transaction Limit: Maximum limit allowed per transaction.

Curfew: The specific days, times and time zone when the Virtual Card can be used.

Validity: The start and end date when the Virtual Card can be used.

Geographic: The countries where the Virtual Card is allowed or not allowed to be used.

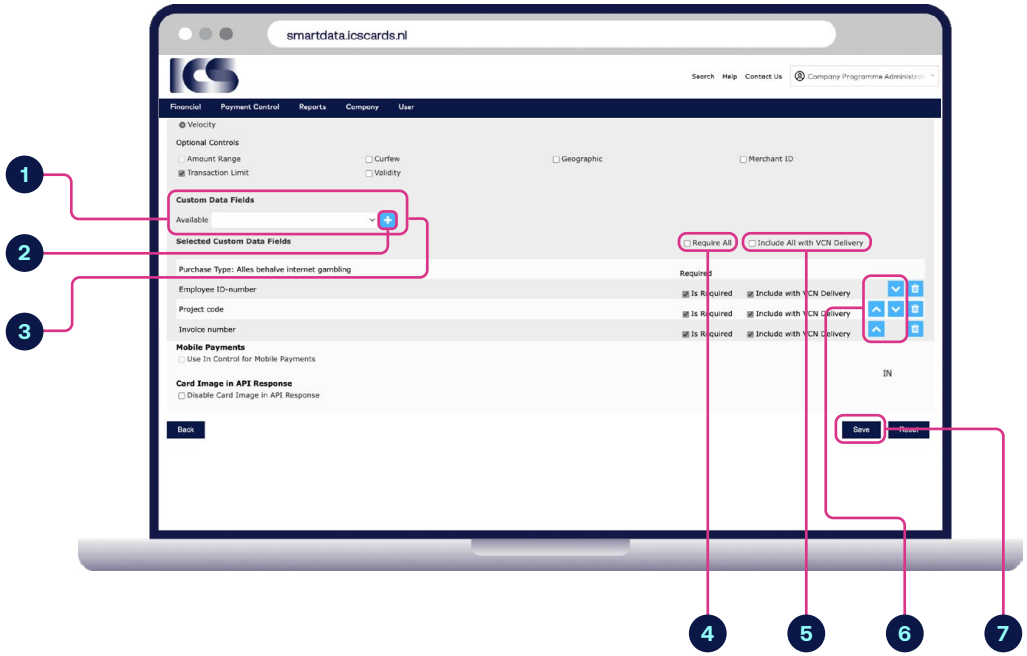
Merchant ID: Restricts the Virtual Card usage to one specific merchant.



Adding Custom Data Fields

Apply Custom Data Fields to Purchase Templates, that must be completed when requesting a Virtual Card. You can select up to **29 Custom Data Fields** for each Purchase Template.

1. Go to **Custom Data Fields**.
2. Click the **plus** **+** **icon** to add a field, e.g. Cost center.
3. Repeat these steps to add multiple fields.
4. Mark fields as **Required** or click **Require All** to make all fields mandatory.
5. Optionally, select **Include with VCN Delivery** to ensure these details are included in the email sent to the supplier along with the Virtual Card Number (VCN).
6. Use the arrows to change the order in which the Custom Data Fields will be displayed.
7. Click **[Save]** to confirm.



International Card Services

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