

# 11. How to Manage Cards

The **Cards** section stores information about the details of the cards in use. This section is directly related to [Accounts](#), [Assets](#), and [Banks](#). You can create a card for a client and connect it through the account to a fiat and crypto asset at the same time (or to one of that asset). All this is done when adding a new card to the CRM.

## Accessing the Cards Module

Click the **Cards** icon (☰) in the left-hand sidebar.

The header shows:

**Total:** Number of cards in the system.

**Search by ID...** field (to filter by card ID or masked number).

**Add card** button in the upper-right.

## Searching & Sorting Cards:

1. **Search:** Type any portion of the **Card** (e.g. "4567") or **ID** to narrow the list in real time.
2. **Sort Columns:** Click the ▲/▼ icons in any column header—such as **Owner**, **Bank**, or **Priority**—to reorder ascending/descending.

## To Add a Card:

1. Click the **Add card** button in the upper right corner of the tab.
2. Enter **Card number**.
3. Then step-by-step add:
  - Owner of the card:** from the list of Clients.
  - Account ID:** from the list of the client's accounts.
  - Crypto asset ID** and/or **Fiat asset ID:** from the lists of the account's assets.
4. In case you select both crypto and fiat asset, select the priority for the asset.
5. Select from the drop-down list Bank.
6. Optionally enter **External ID** for third-party integration.
7. Click **Save** to apply the changes.

You can do following actions with all created cards:

1. Searching
2. Editing
3. Deletion

**To search for a card:** Start typing its **ID** in the **Search** field.

## To Edit a Card:

1. Click the **Edit** icon in the corresponding row.
2. All field in the opened window, except the **Owner**, are changeable. ange account links, asset assignments, bank selection, or external IDs as needed.
3. Click **Save** to apply changes

## To Delete a Card:

Click the **Delete** (🗑️) icon in the card's Actions column.  
Confirm in the prompt.

**Warning:** Deleted cards are not restored.

## Quick Tips

1. **Brand Detection:** The first six digits of the card number auto-select the correct brand icon (Visa, Mastercard, etc.).
2. **Priority Logic:** Use Priority to ensure, for example, that expenses draw from a user's crypto wallet before their fiat balance.
3. **Integration IDs:** Store external gateway IDs in **External ID** to reconcile events from payment processors.

With the Cards module, you maintain a clear, auditable link between physical/virtual cards and the underlying client accounts, assets, and banking relationships.

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