

Account Module Overview

With this release the Account Module will be modified to support the ongoing goal to improve the user experience including a responsive design along with improved system stability.

The base functionality will remain the same as it is today with a few changes to the layout. Users will still access the functionality by navigating to Accounts > Manage Accounts. The search fields displayed will continue to be based on the user's access and permissions as it does today. The option to add a new account now displays to the right of the Manage Accounts label.

Unit or account search criteria must be entered. A minimum of 3 characters are required. You can use an asterisk (*) as a leading or trailing wildcard character for partial searches.

Unit Name **Unit Number**

Account Name **Account Number** **Account status code**

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

[Terms & Conditions](#) and [Privacy Policy](#)

Options to search for active and inactive accounts will remain the same as well. Once the search results display, the grid will automatically expand to fit the data. However, users will have the ability to reduce the view, if desired:

Search Results [Save View](#) [Export All](#)

[SHOW/HIDE COLUMNS](#)

Details	Account Number	Name	Email	Credit Limit	Available Balance	Last Posted Transaction	Inactive	Purged	Date Created
...	420000*****0158	ELAINE PLAKORUS		10,000.00	9,605.00	66.00 3/18/2015	No	No	9/17/2009
...	420000*****0158	ELAINE PLAKORUS		10,000.00	10,000.00	5,549.45 3/13/2013	No	No	9/17/2009

To reduce the grid view, click on the double arrow at the far right of the grid view

Search Results [\(Save View\)](#) [\(Export All\)](#)

[SHOW/HIDE COLUMNS](#)

Details	Account Number	Name	Email	Credit Limit	Available Balance	Last PostedTransaction	In
...	420000*****0158	ELAINE PLAKORUS		10,000.00	9,605.00	66.00 3/18/2015	No
...	420000*****0158	ELAINE PLAKORUS		10,000.00	10,000.00	5,549.45 3/13/2013	No

[Terms & Conditions](#) and [Privacy Policy](#)

The option to modify the grid view has been moved to the top of the grid view directly under the Search Results label. Click on “Show/Hide Columns” to modify the display.

Search Results [\(Save View\)](#) [\(Export All\)](#)

[SHOW/HIDE COLUMNS](#)

- Show All
- Name
- Status
- Email
- Type
- Credit Limit
- Available Balance
- Last PostedTransaction
- Inactive
- Purged
- Date Created
- Expiration Date

Name
ELAINE PLAKORUS
ELAINE PLAKORUS

Users will now just check the fields to display and click on “Save View” to accept their changes. A message will display at the top confirming the changes were saved.

Saved View Successful

Manage Accounts

ADD NEW ACCOUNT

Subunit name

Subunit number

Account Name

Account Number

Account status code

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

Search Results [\(Save View | Export All\)](#)

SHOW/HIDE COLUMNS

Details	Account Number	Name	Email	Credit Limit	Last Posted Transaction	Inactive	Purged	
...	420000*****0158	ELAINE PLAKORUS		10,000.00	66.00 3/18/2015	No	No	9/17/20
...	420000*****0158	ELAINE PLAKORUS		10,000.00	5,549.45 3/13/2013	No	No	9/17/20

The option to export all accounts in the search results now displays as a link versus a button next to the "Search Results" header:

Search Results [\(Save View | Export All\)](#)

SHOW/HIDE COLUMNS

A new "Details" column has been added to the grid. Users will now click on this versus the account number to display the account details. The detail screen will display the same sections with slight modifications to the layout of the fields. Each section will automatically be expanded but can also be collapsed.

Account Management for ELAINE PLAK

***Required field**

Indicates field is updated via real-time

[4 change requests](#) Last request: 10/30/2014 Status: Not submitted

Card Information

Account Number:

420000*****0158

Card line 1: [?]

ELAINE PLAK

Card line 2: [?]

Master Accounting Code [?]

0093102

Address Information

Address Line 1: [?] *

1819 DENVER WEST

Address Line 2: [?]

City [?] *

LAKEWOOD

State/Province: [?] *

CO

Postal code: [?] *

804013191

Country [?]

USA - United States 

Email Address: [?]

Home Phone: [?]

Work Phone: [?]

3038884444

The system will still highlight those fields that can be modified in real time, based on client rules. The options to submit the request display at the bottom of the screen with an option to cancel the request.

MCC Group Authorizations

[ADD MCC GROUP](#)

The account has no MCC groups

[SUBMIT](#)

[SUBMIT WITH NOTE](#)

[?] [Cancel](#)

[Terms & Conditions](#) and [Privacy Policy](#)

Create New Accounts

Users with the permission to create new accounts will continue to select Accounts > Manage Accounts and then click on the “Add New Account” button to follow the wizard.

HOME STATEMENTS **ACCOUNTS** REPORTS EXPENSES ADMINISTRATION HELP

Manage Accounts

ADD NEW ACCOUNT

Subunit name Subunit number

Account Name Account Number

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

[Terms & Conditions](#) and [Privacy Policy](#)

Once the user selects Add New Account, if their company has a hierarchy structure they will be prompted to search for and select the unit for which the card belongs:

HOME STATEMENTS **ACCOUNTS** REPORTS EXPENSES ADMINISTRATION HELP

Select Location for New Account

Unit Name

SEARCH

[Terms & Conditions](#) and [Privacy Policy](#)

Users will then click on the radio button for the correct unit and click next.

Select Location for New Account

Unit Name ▼ 0302*

SEARCH

Select Unit

Select	Unit Name	Unit Number	Hierarchy
<input checked="" type="radio"/>	0302 CLNT SVCS - UK EMPLOYEES	00000302	

NEXT [Cancel](#)

The new account form will display as it does today. Users will continue to be able to apply a card model, if applicable, and then provide card specific information and submit the request.

[← Back to results](#)

Account Management for [New Account]

Select Model/Template:

Travel Card ▼ **APPLY MODEL**

*Required field

Indicates field is updated via real-time

Card Information

Account Number:

Card line 1: [?] *

Card line 2: [?]

Master Accounting Code [?]

The process to create and/or manage card models will remain the same as it is today. Users will still navigate to Accounts > Manage Card Models:

Card Model Maintenance

ADD NEW MODEL

Location:

TSYS (00050000)

SELECT ORGANIZATION [?]

Details	Active	Delete	Card Model Name	Description	Date Modified
...	<input checked="" type="checkbox"/>		Travel Card		4/6/2015 2:42:00 PM

[Terms & Conditions](#) and [Privacy Policy](#)

Program Change Requests

All change requests will continue to be tracked within the Program Change Request Log accessed via Accounts > View Program Change Requests:

Program Change Requests

Search For
 All requests Real-time requests only

Search By
Status

Not submitted Submitted Rejected Received

Date Range
Today

From: 03/15/2015 To: 04/06/2015

SEARCH [?]

Search Results

Actions [?]:

<input type="checkbox"/>	Details	Flag	Notes	Request ID	Status	Real-time	Created	Status Date	Name	Account	Organization Name
<input type="checkbox"/>	...			000000001139425	NotSubmitted	No	3/30/2015	3/30/2015	IJANE DAS	423331*****1194	TS2 TEST SITE
<input type="checkbox"/>	...			000000001139427	NotSubmitted	No	3/30/2015	3/30/2015	IJANE DAS	423331*****1194	TS2 TEST SITE

The details link has been moved to be the first column on the left versus all the way to the right of the grid view. All other navigation remains the same. Below is an example of the request details:

[← Back to results](#)

Request Detail for 420000*****4918

PREVIOUS

NEXT

Request 1 of 103

Detail [?]

Request ID: 0000000001139431

Account: [420000*****4918](#)

Requester: system ProcardSetup

History [?]

Status	Date/Time	User	Notes	Real-time Error
Not submitted	3/30/2015 1:28 PM	system ProcardSetup		

Account information [?]

Actions [?]:  

Field Name	Old Value	Requested Value	Current Value	Real-time Field Error
Address Line 1 01		80 king st		
City 01		st. catharines		
State 01		CO		

Manage Temporary Credit Limits

Users with the permission to manage temporary credit limits will continue to select Accounts > Manage Temporary Credit Limits. Navigation will remain the same as it does today incorporating user access and permissions.

Manage Temporary Credit Limit Controls

[ADD TEMPORARY CREDIT LIMIT CONTROL](#)

Organization: TS2 TEST SITE(00000050)
[SELECT ORGANIZATION](#) [?]

[Manage TCL Controls](#) [Resolve TCL Resets](#) [Cancel TCL Controls](#)

Show logs for:
 All controls Active controls Reset errors Closed (reset) controls

For controls initiated: From To

[SEARCH](#)

TCL Controls Status Log: [\(Export All\)](#)

Active controls, 3/27/2015 - 4/6/2015

Status	Details	Edit	Account Number	Name on Account	Control Status	Temporary Credit Limit
	...		423331*****2421	PETER PAN	Active	100.00
	...		423331*****0675	1JANE DAS	Active	100.00

View Authorization Requests

Users with the permission to view authorization request will continue to select Accounts > View Authorization Requests. Users will then search for the account and click on the account number link to view the details.

Authorization Requests

Please enter search criteria. You can use an asterisk (*) as a leading or trailing wildcard character for partial searches.

Search Account

Name on Account

Active accounts Inactive within 45 days

[?]

Search Results

Account Number	Name	Status	Type	Inactive
423331*****1608	AUDRY HEPBURN	WRADAFLMOTY	I	-

[Terms & Conditions](#) and [Privacy Policy](#)

Users will then click on the details icon to view the specifics of the selected authorization request:

[←Back to results](#)

View Authorization Requests for AUDRY HEPBURN 423331*****1608 [?]

All Approved Declined Referred Fraud Pickup

From

To

Search Results [\(Download All\)](#)

Details	Date/Time	Status	Auth Code	Merchant	MCC	Amount	Type	Reason
...	1/2/2015 3:28 PM	Approved	054565		1234	\$1.00	Purchase	APPROVED
...	1/2/2015 3:27 PM	Approved	078675		1234	\$1.00	Purchase	APPROVED