

CentreSuite Quick Reference Guide

May 2015

Managing Card Models
Program Administrators

Card models provide a way for administrators to minimize the amount of information that is entered when a new card account is needed for a new employee. With card models, you can enter information that will be common to cards that you request, such as address information, and then quickly populate these fields on the new card request. You can define multiple card models with as much or as little information as you like. For example, you can create a card model for employees that travel and require higher credit limits and fewer purchasing restrictions than you may want for employees that only need the card account for in-office purchases.

The process for creating a card model is similar to creating a new card. When you access the Card Model Detail page, you are required to assign a unique name to the card model. All other fields are optional. Fields available for card model creation are typically common to accounts within an organization. Fields that are unique to an account, such as Card Line1, are not available. You can enter or select information for each field you want in the card model and save it. When you create a new account, the card model is selected from a list and all defined fields are applied to the new account.

To create a new card model:

1. Select a unit. If you have access to multiple units, you can only select one.
2. Select *Accounts>Manage Card Models* from the menu. The Card Model Maintenance – Select Organization page is displayed.
3. Select either **Unit Number** or **Unit Name** from the list and specify additional information in the associated field. You can use the asterisk (*) as a leading or trailing wildcard character in partial searches.
4. Click **Search**. The search results are displayed below.
5. Select a unit and click **Next**. The Card Model Detail... page is displayed.
6. Click **Add New Model**. The Card Model Detail for [New Card Model] page is displayed.

Card Model Detail for [New Card Model]

Card model name: [?] *

Card model description:

Card Information ▼

General Information: ▲

Account Holder Information ▲

Authorization: ▲

MCC Group Authorizations ▲

SAVE Cancel

7. Enter a unique name in the **Card model name** field. Example: Travel Cards. This field is required.
8. Enter a description in the **Card model description** field. This field is optional.

9. Enter or select all additional information you want in your card model. For a description of these fields, refer to the following quick reference guides:

Creating a New Account

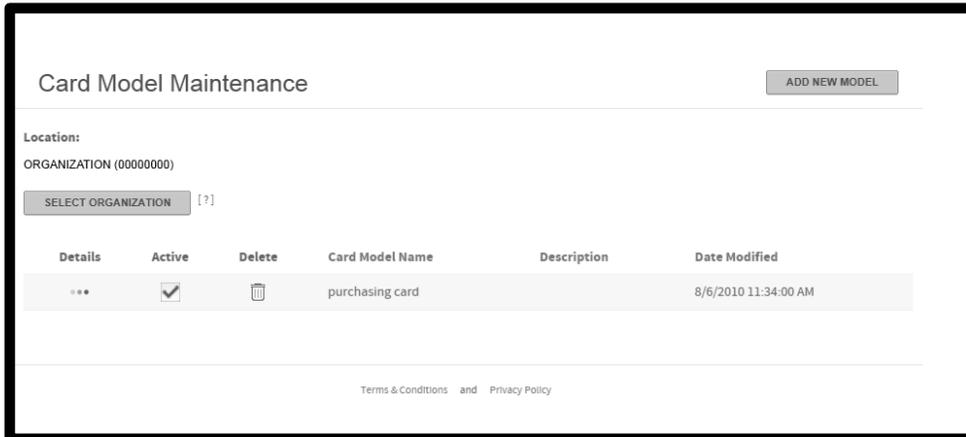
Modifying Accounts

You can also refer to the online help topic *Creating or modifying accounts* by selecting *Help>Help on This Page* from the menu while on the Account Management page.

10. When the card model is complete, click **Save**. The card model is saved.
11. Click **Back to results** to return to the Unit Search page.

To edit an existing card model:

1. Select a unit. If you have access to multiple units, you can only select one.
2. Select *Accounts>Manage Card Models* from the menu. The Card Model Maintenance – Select Organization page is displayed.
3. Select either **Unit Number** or **Unit Name** from the list and specify additional information in the associated field. You can use the asterisk (*) as a leading or trailing wildcard character in partial searches.
4. Click **Search**. The search results are displayed below.
5. Select a unit and click **Next**. The Card Model Detail ...page is displayed.



6. You can edit the existing card model fields by clicking the detail icon (●●●) to open the Card Model Detail...page, editing the fields as required, and clicking **Save**. For a description of these fields, refer to the following quick reference guides:

Creating a New Account

Modifying Accounts