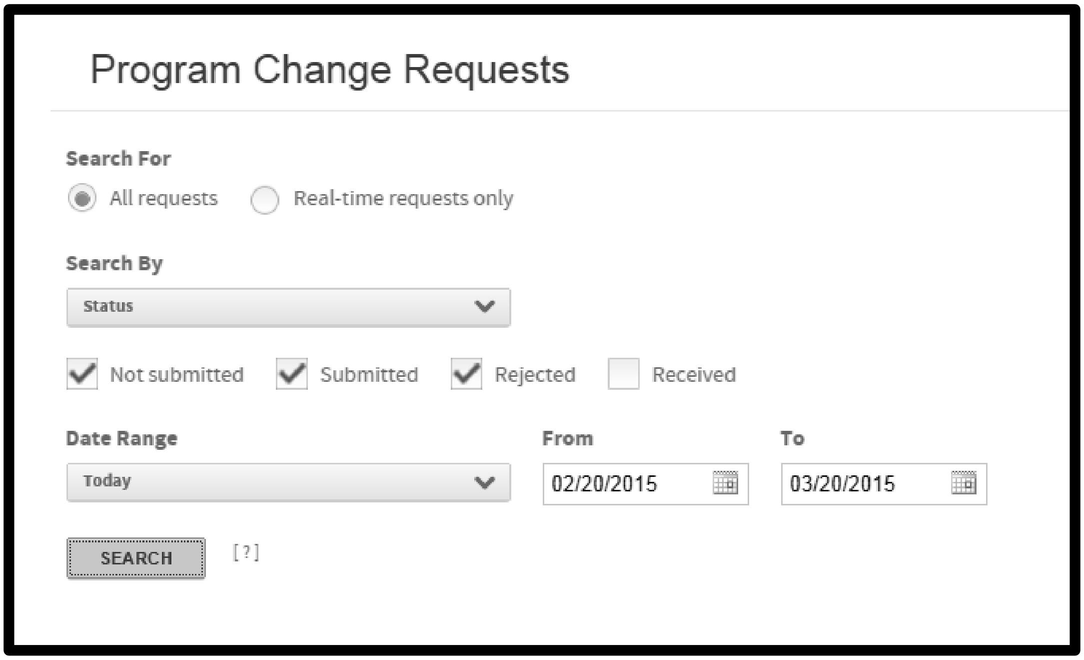
CentreSuite Quick Reference Guide

May 2015

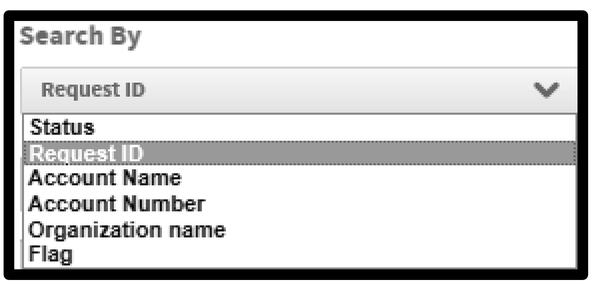
Working with Program Change Requests (PCR) – Program Administrators

Program Change Requests (PCR) provides the audit trail of changes made to cards within your commercial program. The following information describes what you need to do you to review those changes.

To search for requests



1. If real-time requests are available for your site, select whether you want to search for **All requests** or for **Real-time requests only**.
2. In the **Search By** list, select the criteria you want to search by. Depending on your selection, different fields or check box selections are displayed. If you select **Account Name**, **Account Number** or **Organization Name**, a search field is displayed. Enter additional information in this field to narrow your search. You can use an asterisk (*) as a leading or trailing wildcard character in partial searches.

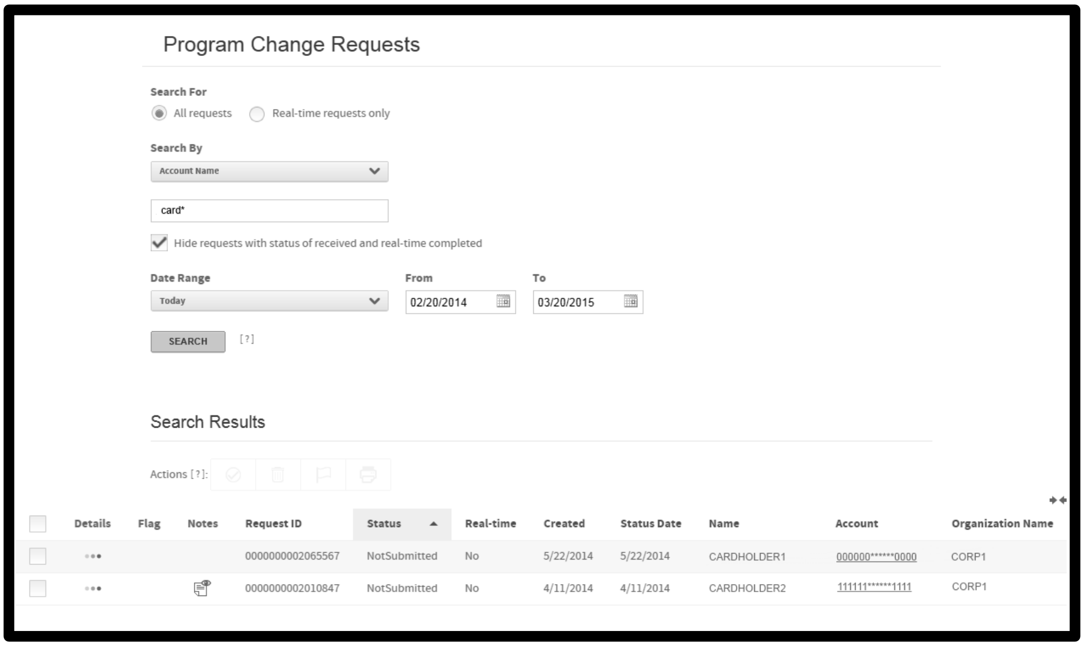


Note: The **Search By** list does not display for Status or Flag searches. When you select **Status,** check boxes display to let you select **Not submitted**, **Submitted**, **Rejected**, or **Received**, or any combination of those. When you specify **Flag**, no other search information is needed. You can use the flag to mark a change for future follow up. You can use a flag note to record notes for yourself. For example, “Don’t forget to call Harvey on Wednesday to make sure he knows about this change.”

3. If the **Hide requests**... check box is displayed, select it to exclude requests with received and real-time completed status from the search results. The Hide Requests check box is displayed when you search using any option other than **Status**.
4. Select a date range from the **Date Range** control. To specify a custom date range, click each calendar control ( ) to select a custom **From** and **To** date or type the date in the **From** and **To** fields using the MM/DD/YYYY format.

Note: The Date list does not display if you select Request ID in the **By** field (Step 2).

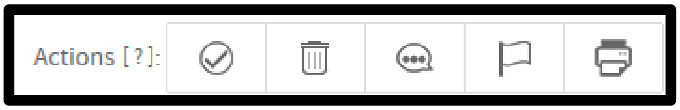
5. Click **Search**. Requests that match the criteria and date range are displayed in the Search Results list.



Note: New card requests will display multiple PCRs for the creation of a single new card. These multiple requests are a result of the processing procedure for creating new cards on the main processing system.

To work with requests

You can select the PCRs to perform an action on and then select that action from the Actions control at the top of the Search Results. Not all tasks are available to all users: you may see only a subset of these icons in the **Actions** control.

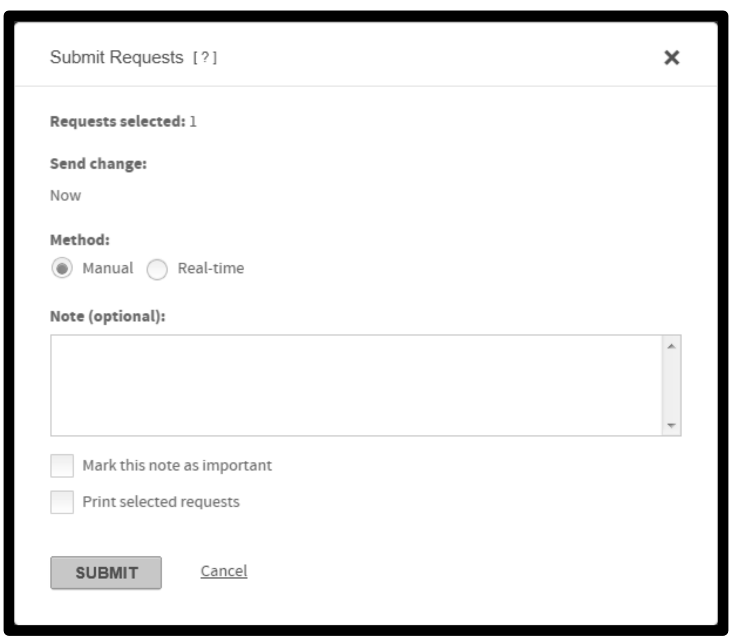


- Submit ( )
- Delete ( )
- Change status ( )
- Flag for follow-up ( )
- Print ( )

1. Select the check box by each request on which you want to perform the task. You can select the check box in the column header to select all requests. Select it again to de-select all requests

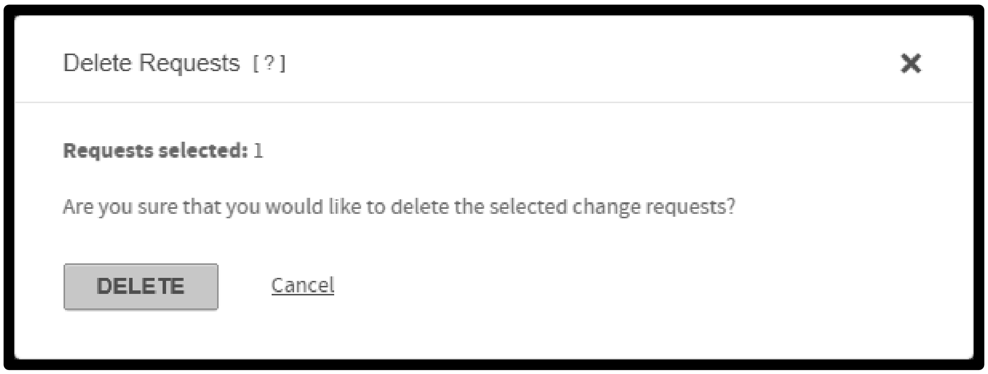
   Important: Not all tasks are valid for all requests. For example, you cannot submit or delete a request with a status of **Received**. The action icons are activated only for requests on which the selected action can be performed. If you select actions with different statuses, for example, Rejected and Not Submitted, the icon for Change Status ( ), which normally activates for the Rejected status, will not activate.

2. Click the action icon in the Actions control. One of the following confirmation dialogs display.
   - **Submit**



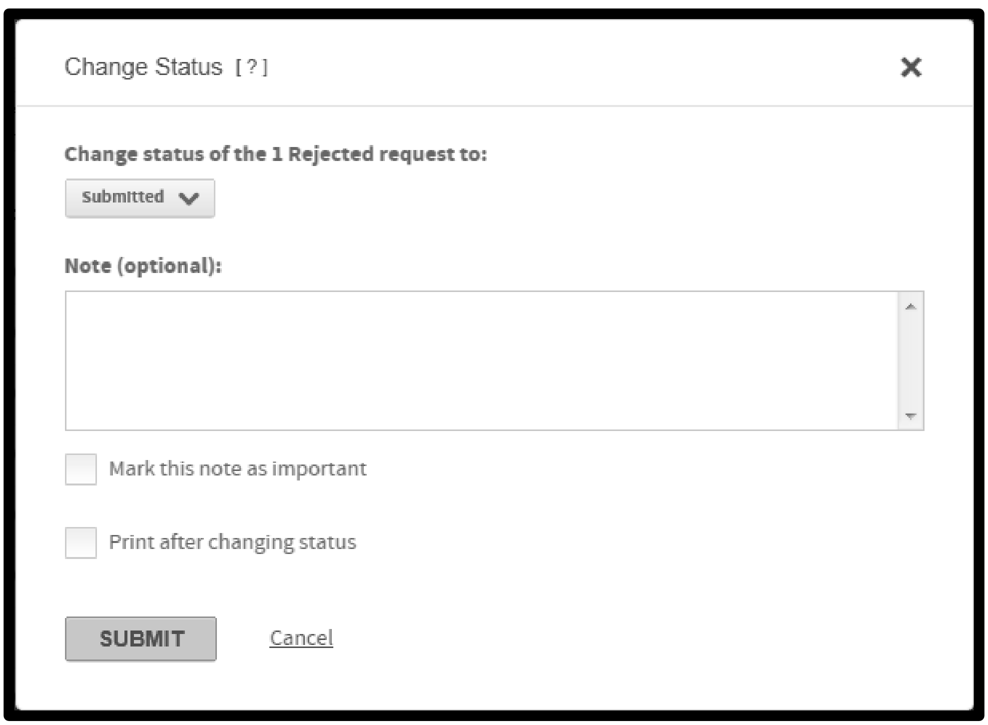
Select **Manual** or **Real-time**. You can enter a note about the requests, if needed. The note is appended to the selected requests for others to view. You can mark the note as important and print the requests. Click **Submit** to submit the requests.

- **Delete**



Click **Delete** to delete all selected requests.

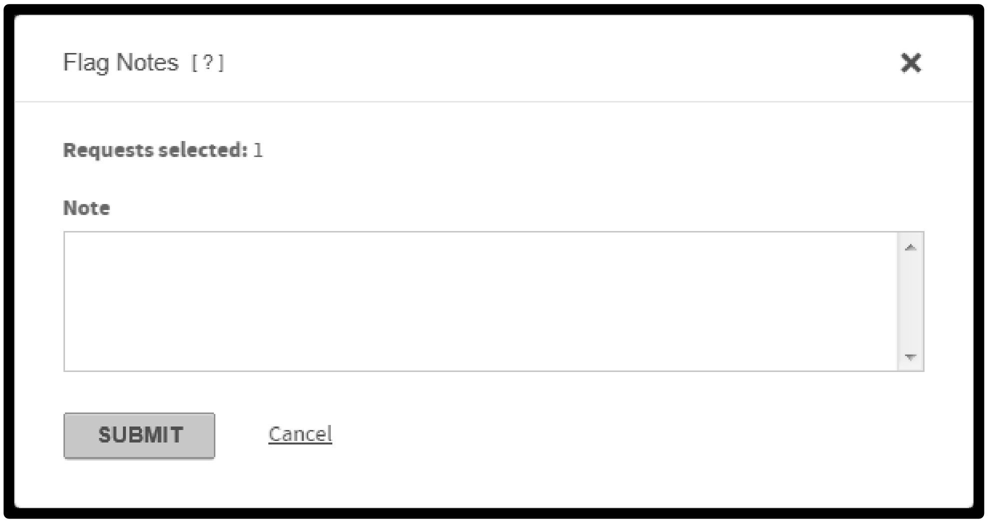
- **Change Status**



Select the new status from the **Change status of…** list. You can enter a note about this change for others to read (optional). Finally, you can specify that you want to print information about the requests after the status is changed.

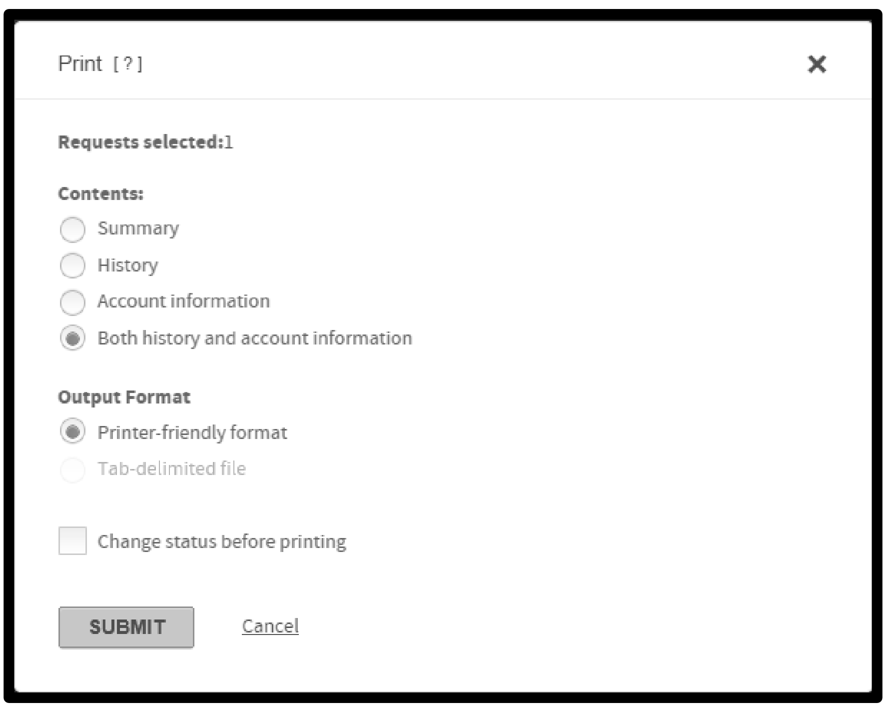
Click **Submit**. The status of each selected request is changed and the Print dialog displays if you selected the **Print after changing status** check box.

- **Flag for follow-up**



Enter a flag note and click **Submit**. The flag note is added to each selected request, and a Flag icon () is displayed next to the request in the search results list.

- **Print**



Select one of the following **Contents** options:

Summary: Information in the Search Results page.
History: Information in the top of the request detail page.
Account information: Information in the bottom of the request detail page.
Both history and account information: All information in the request detail page.

Select one of the following **Output Format** options:

Printer-friendly format: The requests are sent to your local printer
Tab-delimeted file: This option activates only when the Summary contents is selected. The information is output to a tab delimited file.

Viewing notes and flag notes

You can add information about individual program change requests with *notes* and *flag notes*:

- A *note* ( ) can be viewed by anyone who works with this request. Use a note to record information that others may need to know. For example, “Account holder requests increased card limit for special equipment purchases.” You can add a note whenever you submit a request or change its status.
- A *flag note* ( ) can be viewed only by the person who adds the flag note to this request. Use a flag note to record notes to yourself. For example, “Don’t forget to call Harvey on Wednesday to make sure he knows about this change.” You can add a flag note to a request anytime from the Search Results list.

To view notes and flag notes:

From the Program Change Requests Search List, click the appropriate icon next to the request, as follows:

- When you click the Flag Note icon, the flag note dialog displays with your note. Only your most recent flag note is displayed. Previous flag notes about this request are not saved.
- When you click the Note icon, the Notes dialog displays, containing all notes for this request in order of their entry. You cannot edit or delete previous notes. Click **Print** to print the complete list of notes.