

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

The screenshot shows the 'Program Change Requests' search interface. It includes a 'Search For' section with radio buttons for 'All requests' (selected) and 'Real-time requests only'. Below is a 'Search By' dropdown menu currently set to 'Status'. There are four checkboxes for status filters: 'Not submitted' (checked), 'Submitted' (checked), 'Rejected' (checked), and 'Received' (unchecked). The 'Date Range' section has a 'Date Range' dropdown set to 'Today', a 'From' date field with '02/20/2015' and a calendar icon, and a 'To' date field with '03/20/2015' and a calendar icon. At the bottom is a 'SEARCH' button and a help icon '[?]'. The entire interface is enclosed in a black border.

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.

This close-up shows the 'Search By' dropdown menu. The options listed are: 'Request ID' (selected), 'Status', 'Request ID', 'Account Name', 'Account Number', 'Organization name', and 'Flag'. The 'Request ID' option is highlighted with a grey background.

This close-up shows the search filters. The 'Search By' dropdown is set to 'Account Name'. Below it is a text input field containing 'and*'. At the bottom, there is a checked checkbox with the label 'Hide requests with status of received and real-time completed'.

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.

Program Change Requests

Search For
 All requests Real-time requests only

Search By
Account Name
card*

Hide requests with status of received and real-time completed

Date Range
Today From: 02/20/2014 To: 03/20/2015

SEARCH [?]

Search Results

Actions [?]:






	Details	Flag	Notes	Request ID	Status	Real-time	Created	Status Date	Name	Account	Organization Name
<input type="checkbox"/>	...			000000002065567	NotSubmitted	No	5/22/2014	5/22/2014	CARDHOLDER1	000000*****0000	CORP1
<input type="checkbox"/>	...			000000002010847	NotSubmitted	No	4/11/2014	4/11/2014	CARDHOLDER2	111111*****1111	CORP1

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.



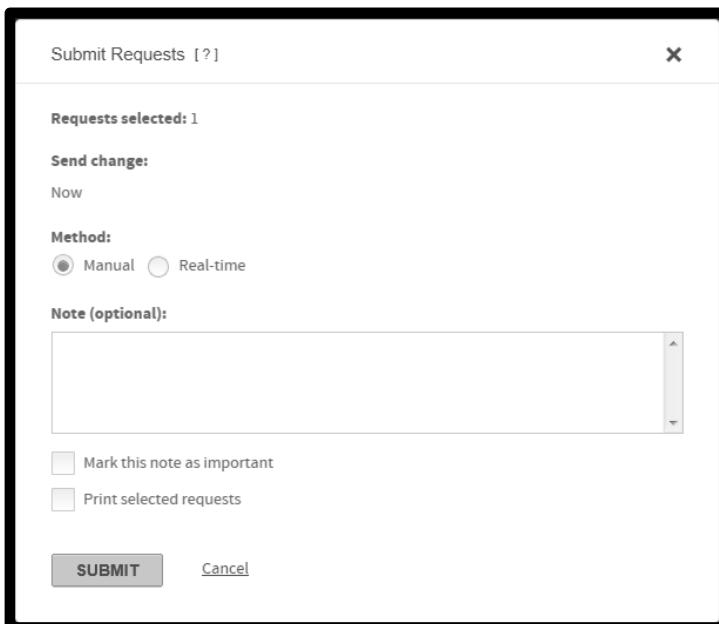
- Submit ()
- Delete ()
- Change status ()
- Flag for follow-up ()
- Print ()

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.

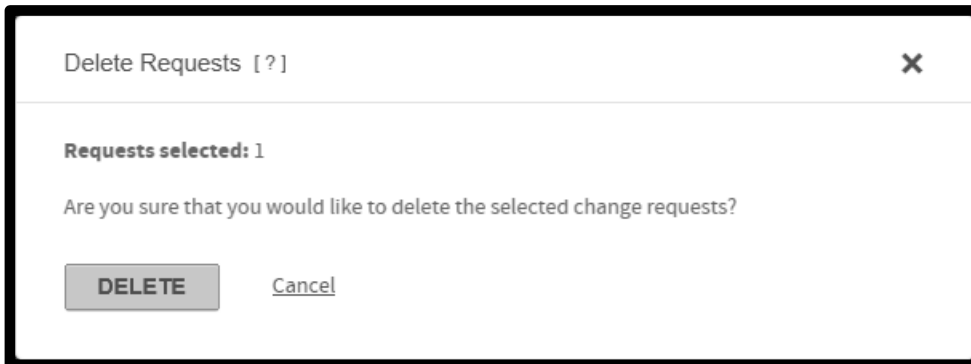
- **Submit**

A dialog box titled "Submit Requests [?]" with a close button (X) in the top right corner. The dialog contains the following elements:

- Requests selected:** 1
- Send change:** Now
- Method:** Manual Real-time
- Note (optional):** A text input field with a vertical scrollbar.
- Mark this note as important
- Print selected requests
- Buttons: **SUBMIT** and [Cancel](#)

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.

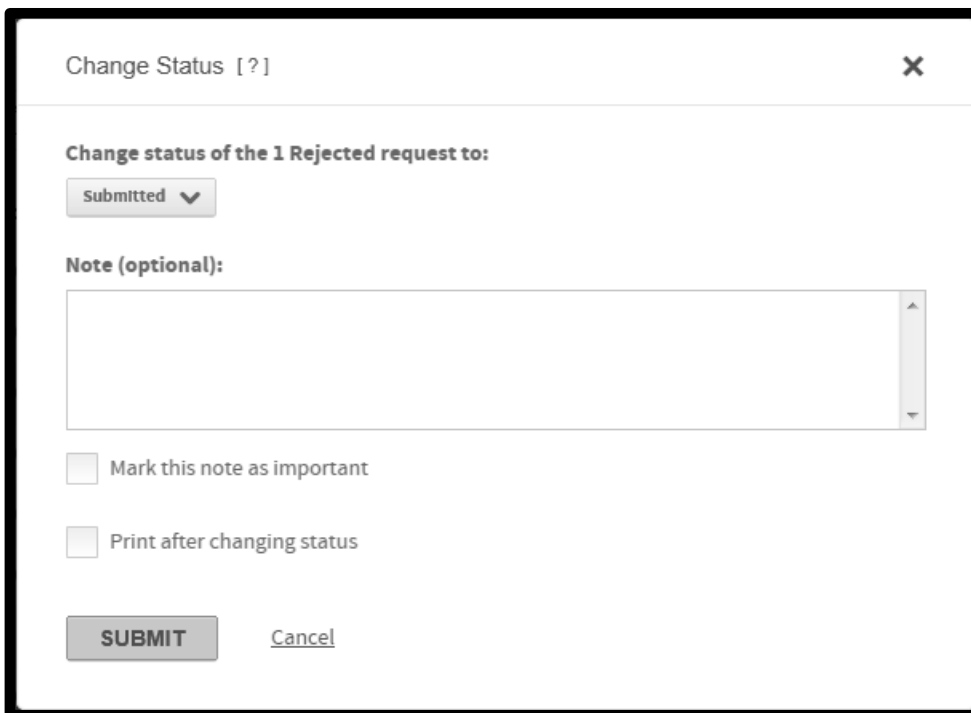
- **Delete**



The dialog box is titled "Delete Requests [?]" and has a close button (X) in the top right corner. Below the title bar, it displays "Requests selected: 1". The main text asks, "Are you sure that you would like to delete the selected change requests?". At the bottom, there are two buttons: "DELETE" and "Cancel".

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

- **Change Status**

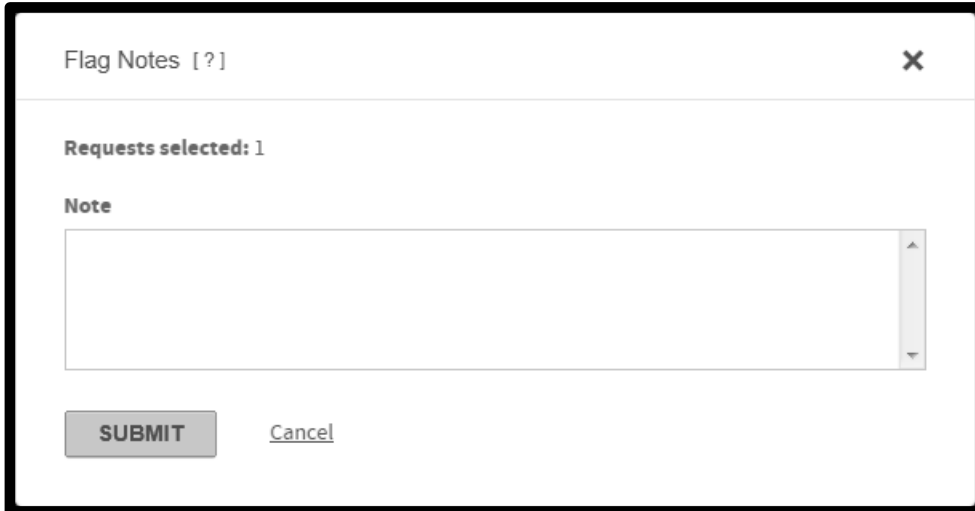


The dialog box is titled "Change Status [?]" and has a close button (X) in the top right corner. Below the title bar, it displays "Change status of the 1 Rejected request to:". There is a dropdown menu showing "Submitted" with a downward arrow. Below this is a section labeled "Note (optional):" with a large text input area. At the bottom, there are two checkboxes: "Mark this note as important" and "Print after changing status". At the very bottom, there are two buttons: "SUBMIT" and "Cancel".


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.

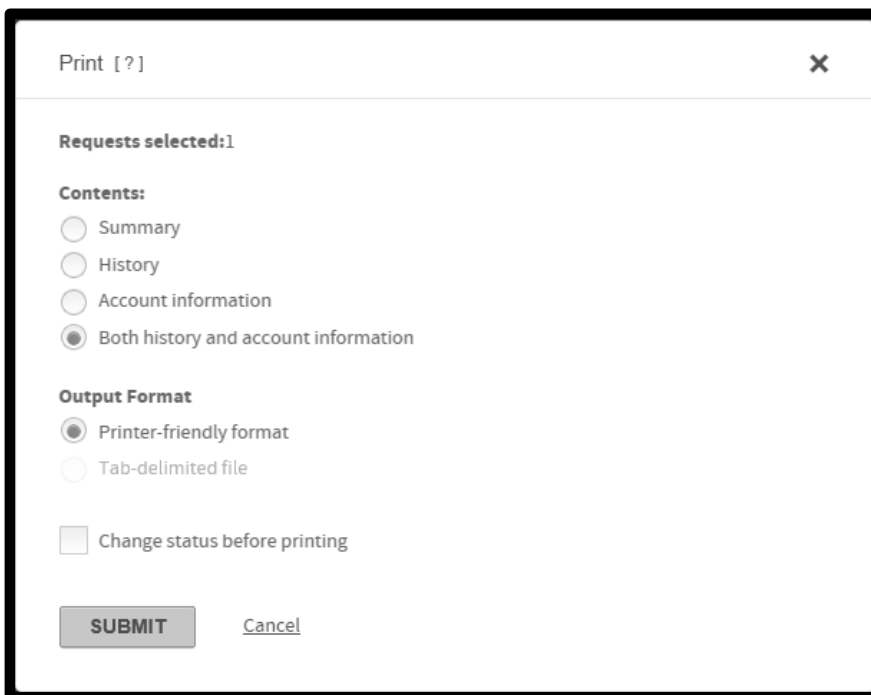
- **Flag for follow-up**



The screenshot shows a dialog box titled "Flag Notes [?]" with a close button (X) in the top right corner. Below the title bar, it says "Requests selected: 1". Underneath, there is a section labeled "Note" with a large, empty text input field. At the bottom of the dialog, there are two buttons: "SUBMIT" and "Cancel".

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**



The screenshot shows a dialog box titled "Print [?]" with a close button (X) in the top right corner. Below the title bar, it says "Requests selected: 1". Underneath, there is a section labeled "Contents:" with four radio button options: "Summary", "History", "Account information", and "Both history and account information". Below that is a section labeled "Output Format" with two radio button options: "Printer-friendly format" and "Tab-delimited file". At the bottom of the dialog, there is a checkbox labeled "Change status before printing" which is currently unchecked. At the very bottom, there are two buttons: "SUBMIT" and "Cancel".

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-delimited 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.