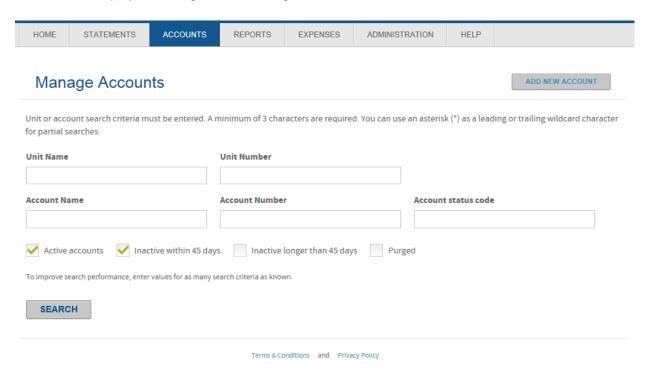
Account Module Overview

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.

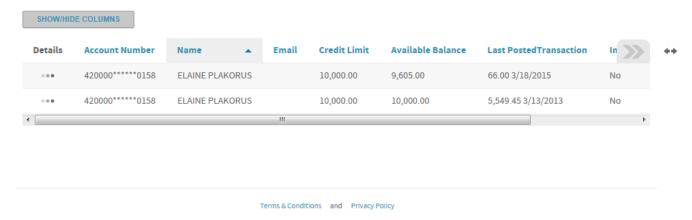


Options to search for active and inactive accounts will remain the same as well. Once the search results display, the grid will automatically expand to fit the data. However, users will have the ability to reduce the view, if desired:



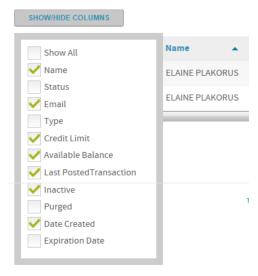
To reduce the grid view, click on the double arrow at the far right of the grid view

Search Results (Save View | Export All)



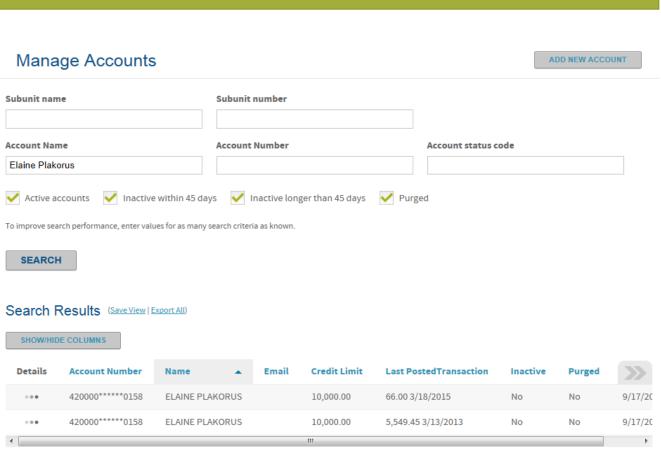
The option to modify the grid view has been moved to the top of the grid view directly under the Search Results label. Click on "Show/Hide Columns to modify the display.

Search Results (Save View | Export All)



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.





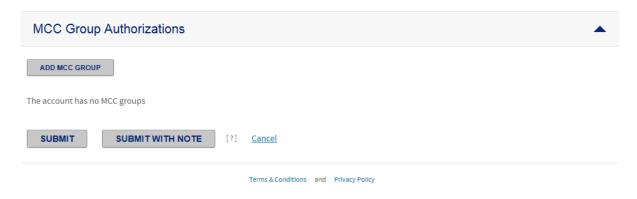
The option to export all accounts in the search results now displays as a link versus a button next to the "Search Results" header:



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.

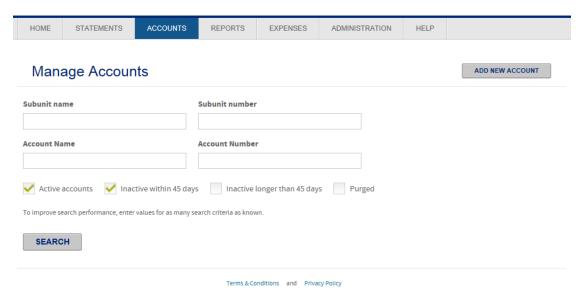
Account Management for ELAINE PLAK *Required field Indicates field is updated via real-time 4 change requests Last request: 10/30/2014 Status: Not submitted **Card Information Account Number:** 420000******0158 Card line 1: [?] ELAINE PLAK Card line 2: [?] Master Accounting Code [?] 0093102 Address Information Address Line 1: [?]* Address Line 2: [?] 1819 DENVER WEST City [?]* State/Province: [?]* Postal code: [?]* LAKEWOOD CO 804013191 Country [?] Email Address: [?] Home Phone: [?] USA - United States 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.

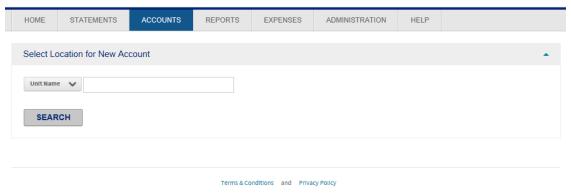


Create New Accounts

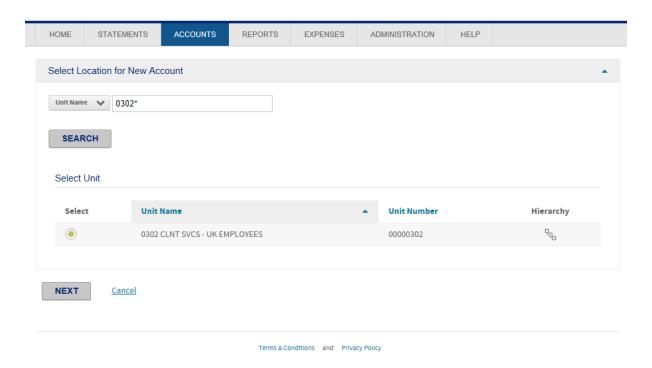
Users with the premission to create new accounts will continue to select Accounts > Manage Accounts and then click on the "Add New Account" button to follow the wizard.



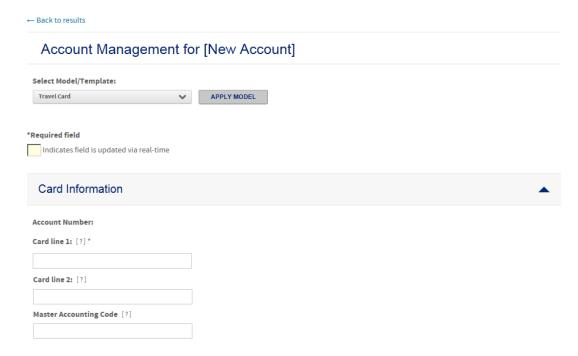
Once the user selects Add New Account, if their company has a hierarchy structure they will be prompted to search for and select the unit for which the card belongs:



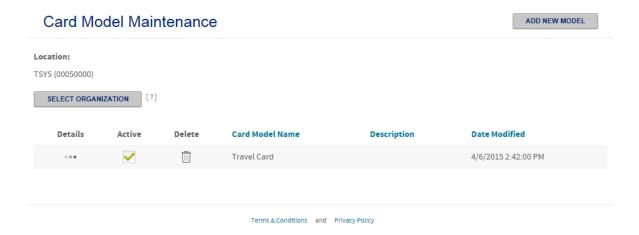
Users will then click on the radio button for the correct unit and click next.



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.

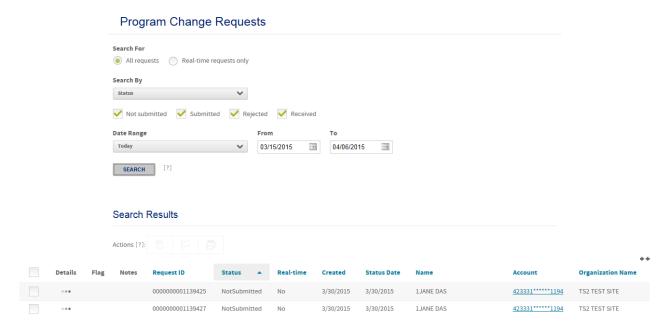


The process to create and/or manage card models will remain the same as it is today. Users will still navigate to Accounts > Manage Card Models:



Program Change Requests

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



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:

$\leftarrow \mathsf{Back}\,\mathsf{to}\,\mathsf{results}$ Request Detail for 420000*****4918 PREVIOUS NEXT Request 1 of 103 Detail [?] 000000001139431 Request ID: 420000*****4918 Account: 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 [?]:

Requested Value

80 king st

st. catharines

Current Value

Field Name

City 01

State 01

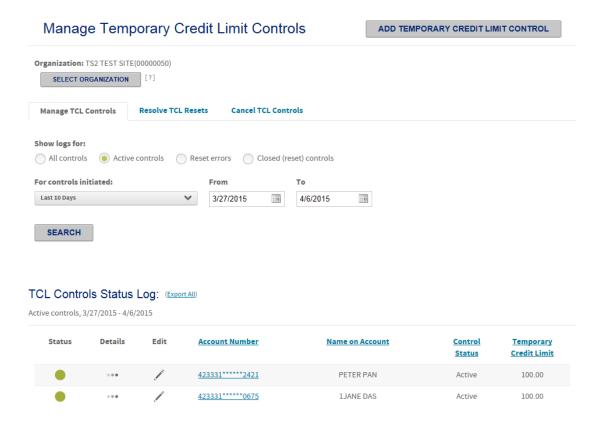
Address Line 101

Old Value

Real-time Field Error

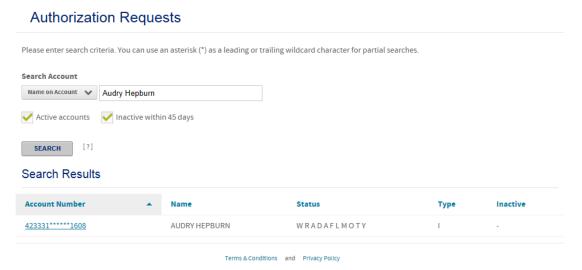
Manage Temporary Credit Limits

Users with the premission 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.



View Authorization Requests

Users with the premission 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.



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

