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P-Card Tutorial: Admin Functions in Centresuite

P-Card Tutorial Video: Admin Functions in Centresuite Script

Hello, my name's Will Fountain. In this video, we're going to explore some of the admin functions that are available with the Centresuite software.

So, what we'll do first is explore if you had a situation where a cardholder needed some adjustments to their card. For example, if they're out on the road and they're running into issues, then we can come, as an administrator you'll have access to make some changes to their cards. So, what we'll do is just simply go to account, manage account, then I'm going to find Karen Grahn who is my supervisor.

Right here, she's at the top, I would click "details" after I typed her name in. It's going to pull up the management page for Karen. Everything in yellow is a real time update, you can see we have some generic information up top, some billing information, there is an opportunity to order replacement cards here. We can throw travel watches, we can open the card up for full use, we can throw a fraud watch on there. For example, if Karen called the office and said "hey, something happened, I don't know where my card is" which she would never do, but if she did then we would have to throw a fraud watch on there which would temporarily pause it.

If for some reason it was compromised, her card was compromised or she decided to leave the company, we could close the card immediately all right here within this system.

I did mention that "order the replacement card" too so if the card was compromised, we could simply close the card, come up, order a new card, and it would be shipped out to her.

Another instance that she might have is if for example she's traveling or she's paying for a large event and $15,000 just wasn't going to cut it for her, we could come in here, simply delete the "15," type in "20," scroll all the way down, hit submit, or we could submit with a note which is probably a good option. And as soon as this thing refreshes you can see now, she has an additional $5,000.

I would point out while we're doing this, that you can also do temporary card limits. So, an example here would be if someone needed an additional $500 for the weekend, or for next week's project, then we could add a temporary credit limit and have it reset at a certain or particular time in the future. That would prevent us from coming back in and forgetting to reset it.

Also, the Merchant Category Code Groups – you know the beauty with the purchase cards is you can control where they work via Merchant Category Code restrictions. So, if you think about convenient stores or excuse me, the merchant machines, every time you stick your card in a machine, that card is coded to a particular industry type.

So, it gets to the granular level of like a pay at the pump fuel versus inside the convenient store. You can think about Home Depot versus Office Depot, restaurants versus hotels, there's just a hundred or so merchant category codes and they can all be managed right here inside this system. You can make real-time adjustments to that as well.

So that's one thing that you might be able to do for your cardholders right there. The beauty of the p-card, or excuse me, the software is that you can make these changes without having to pick up the phone and call your banker.

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Something else that you might want to do is view account activity. So, my name's Will Fountain if we wanted to see anything going on with my card, you know we can see the summary of the balance, any transactions that have occurred, nothing's happened lately, haven't been traveling a ton.

I can view my statements, you can see they go all the way back I think it's 16 months there, see October of 2018, that's two years, 24 months. All of this is stored on here.

We would encourage you to download it and save it to your desktop, but it is stored on the system for 24 months.

Lastly, I will point out the reports. Oh, excuse me, let me go to standard reports. So, these are all pre-loaded on the system. You can see a number of reports here, you have description over here, a little synopsis of what it is. You can run these on demand, you can schedule them to run throughout the certain times of the month, can be really handy if we have a board meeting the 3rd Thursday of every month. Perhaps on Tuesday before we want to run this allocation analysis report, try to get an idea of where were spending money and how were spending money, that way we're prepared going into our meeting.

I'll point out that if you don't find what you need in here, we have the ability to help write a report using our data mapping tool. So, these are some custom reports that we've done for our bank, we can work with you or your clients to get them what they need.

A lot of functionality here at this software. If you want to learn more, please reach out to us. We would love to talk about the product with you, just show you what it can do. Our contact information is in the lounge. Thank you.