Managing Temporary Credit Limit Controls

You manage and resolve temporary credit limit (TCL) controls from this page. Select Accounts>Manage Temporary Credit Limits from the menu. If you have access to one organization (unit), proceed to Managing Temporary Credit Limit controls. If you have access to multiple units, search for a single unit using the procedure below.

Searching for a unit if you have access to multiple units

1. Click Select Organization. The Select Organization dialog opens.
2. Select a search type from the Search by list. You can select a Unit Name or Unit Number search.
3. Specify a value in the Search for field. You can use the wildcard character (*) to specify partial searches.
   a. Note: If you leave this field blank, the first 300 units will be returned by your search. If you cannot find the unit you want, narrow your search criteria.
4. Click Go. The search results display.
5. Locate the unit that contain the accounts for which you want to create or review temporary credit limit controls.
   a. Note: You can sort the results set by clicking the Unit Name or Unit Number column title. When the sort arrow appears, click the column title again to toggle the sort order between ascending or descending.
6. Click the unit name to select it. The unit and the unit hierarchy appear below.
7. When you have located the unit you want, click OK. The Manage Temporary Credit Limit controls page appears.

Managing Temporary Credit Limit Controls

This page consists of two tabs, the Manage TCL Controls and Resolve TCL Resets tabs. The Manage TCL Controls tab displays by default. On this tab you search for TCL controls, view TCL details, and edit accounts listed in the TCL log. The Resolve TCL Resets tab displays controls with Failed or Retrying statuses from the last 45 days. You cannot search on this tab.
The five control statuses are denoted by a symbol in the left column of the status log and a description in the Control Status column. The statuses and their descriptions are listed below.

<table>
<thead>
<tr>
<th>Symbol</th>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Initialize</td>
<td>The TCL control will have this status between the time it is submitted until the system receives a response from the processor.</td>
</tr>
<tr>
<td></td>
<td>Active</td>
<td>The TCL control has been applied to the account.</td>
</tr>
<tr>
<td></td>
<td>Retrying</td>
<td>An issue with the TCL control has been encountered. The system checks the status of the TCL control daily. After the third failure (three days), the TCL control status is changed to Failed.</td>
</tr>
<tr>
<td></td>
<td>Failed</td>
<td>The TCL control failed. Some possible reasons are a changed account status or downtime at the processor. Contact your system administrator.</td>
</tr>
<tr>
<td>✔</td>
<td>Successful</td>
<td>The TCL control has completed and the account reverted to the original credit limit.</td>
</tr>
</tbody>
</table>

**Searching for TCL controls**

Active TCL controls initiated in the last 10 days display in the Temporary Credit Limit Status Log. You can search for additional TCLs by using the following procedure.

1. Select a log type from the **Show logs for** option. You have a choice of one of four control options.
   a. All controls - This option returns all control statuses: Initialize, Active, Retrying, Failed, and Successful.
   b. Active controls - Active controls are listed.
   c. Reset errors - Failed controls are listed.
   d. Closed controls - Successful controls are listed.
2. Select a date range from the **For controls initiated** list. You can use the **From** and **To** calendar controls to specify a custom date range. The date range cannot exceed 45 days.
3. Click **Search**. The search results display in the Temporary Credit Limit Status log. Controls with Failed or Retrying statuses display on the Resolve TCL Resets tab.

**Managing TCL controls**

When your search is complete, locate the TCL control you want to review. Remember, the Resolve TCL Resets tab displays controls with Failed or Retrying statuses from the last 45 days regardless of your search criteria. You can perform the following management tasks on both tabs.

1. Click the TCL control detail icon to open the Status Detail dialog. This dialog lists the information about the original TCL control. Click **OK** to close this dialog.
2. Click the **Edit** link to open the Account Management screen. You modify account information on this screen.
3. To create a new TCL control, click **Add Temp Credit Limit Control**. The Add Temporary Credit Limit Control page displays.