

Access Online

Cardholder-initiated Account Setup

User Guide

Version 1.9
Cardholder



All of **us** serving you™



Contents

Introduction..... 1

Complete Your Portion of the Account Setup..... 2

Authorize a Credit Check 8

Introduction

In this user guide, you will learn how to initiate your own account setup by using a temporary user ID and password from your Program Administrator to specify your demographic information.

Learn More: Refer to the *Access Online Glossary* for definitions of terms in the Access Online user guides and web-based training lessons.

Complete Your Portion of the Account Setup

To increase the efficiency of setting up the accounts in your organization, your Program Administrator may use the cardholder-initiated account setup function to let you specify the demographics information for your account.

You begin by using a temporary user ID and password from your Program Administrator to log in to Access Online. You then specify your name and contact information and save your work. Access Online then sends this demographic information to your Program Administrator to use to complete the process of setting up your account.

Tip! You can only use the temporary user ID and password to log in to initiate your account setup and specify demographic information. You cannot use the user ID and password to log in to Access Online to complete any other tasks.

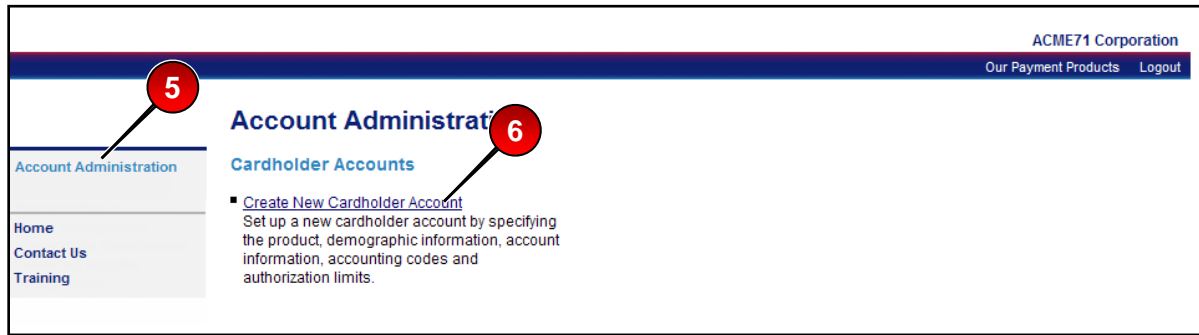
The screenshot shows the 'Welcome to Access Online!' login page. It features a navigation bar with 'Our Payment Products' on the right and 'Contact Us' and 'Login' on the left. The main heading is 'Welcome to Access Online!' followed by the instruction 'Please enter the information below and login to begin.' There are four numbered callouts: 1 points to the 'Organization Short Name:' field, 2 points to the 'User ID:' field, 3 points to the 'Password:' field, and 4 points to the 'Login' button. Below the fields are links for 'Forgot your password?', 'Register Online', and 'Website/Browser Requirements'. A yellow callout box on the right contains the text: 'The temporary user ID and password gives you access to only your portion of the account setup. You cannot use the ID and password to access any other Access Online function.'

To complete your portion of your account setup:

1. Type your organization short name (e.g., **ACME**) in the *Organization Short Name* field.
2. Type the temporary user ID in the *User ID* field.
3. Type the temporary password in the *Password* field.
4. Click the **Login** button.

Learn More: If you do not have your organization short name, temporary user ID, or temporary password, contact your Program Administrator.

Cardholder-initiated Account Setup



5. Select the **Account Administration** high-level task. The *Account Administration* screen displays.
6. Click the **Create New** link. The *Cardholder Accounts: Setup Demographics* screen displays.

Tip! The fields on the *Setup Demographics* screen will be different depending on the type of card you will be using (e.g., a purchasing card to buy office supplies, a corporate card to purchase travel). A red asterisk (*) indicates that the field is required. This example is for a purchasing card.

Cardholder-initiated Account Setup

Cardholder Account
Setup Demographics

Demographics → Account Information → Accounting Code → Authorization Limits

Enter demographic information and click Save & Continue.

* = required

Product: Purchasing

Last Name:* 8 First Name:* 7 MI:

SSN: 8

Date of Birth: 9
Month Day Year

Optional 1: 10 Optional 2: 11

Address 1:* 11 Address 2:

City:* 12 State/Province: (* if USA or Canada) Zip/Postal Code: (* if USA or Canada)

Country:* 12

Work Phone:* 12 Home Phone: 13

Alternate Phone: 14 Fax:

Email Address: 14

Demographics Comments: 15

Note: The maximum amount of characters allowed is 254.
Character count = 0

File for Later Cancel Setup

Note the bold Demographics breadcrumb to show which setup screen you are on. Your Program Administrator completes the other portions.

Which fields display depend on your organization's preferences. For example, some organizations require social security number and some do not.

7. Type your last name, first name, and middle initial (optional) in the *Last Name*, *First Name*, and *MI* fields.
8. If required by your organization, type your social security number (without dashes) in the *SSN* field.
9. Specify your date of birth, if desired.
10. Type information in any of your organization's optional fields.
11. Specify your address in the *Address 1*, *City*, *State*, and *ZIP/Postal Code*, and *Country* fields.
12. Type your work telephone phone number in the *Work Phone* field in XXXXXXXXXX format (e.g., 6121235555).
13. Type additional phone and fax numbers, if needed.
14. Type your email address in the *Email Address* field.
15. Type any comments in the *Demographics Comments* field.

Cardholder-initiated Account Setup

Tip! The system automatically validates the address you enter. The system displays error messages with instructions if you use invalid characters. For example, if your city and state are not valid for the ZIP code, or the address requires a suite number, then an error message displays with instructions for correcting the address.

Tip! Any comments that you type are visible to your Program Administrator and any other user with access to your account. Also, any comments you type will be visible on your account profile once your account is active in Access Online. You can see the setup comments in the sample account profile screen below.

Cardholder Account Profile

Demographic Information

Card Account Number: *****8956, MIGUEL BUCHANAN [Switch Accounts](#)

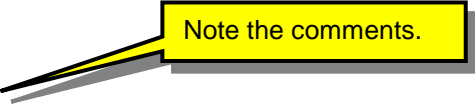
Name
Name: MIGUEL BUCHANAN
SSN:
Date of Birth: 12/31/1900
Optional 1:
Optional 2:

Address
Address 1: 200 SOUTH SIXTH STREET
Address 2: EP-MN-L26C
City: MINNEAPOLIS
State/Province: MN
Zip/Postal Code: 55402-1403
Country: United States

Contact Information
Work Phone: 612-973-0000
Home Phone:
Alternate Phone: 605-444-7870
Fax: 651-911-1919
Email Address: MIGUEL.BUCHANAN@ACME.COM

Demographics Comments:
SALES OFFICE MOVED TO MINNEAPOLIS IN JUNE.

[<< Back to Cardholder Account Summary](#)



Cardholder Account Setup Demographics

Demographics → Account Information → Accounting Code → Authorization Limits

Enter demographic information, then Save & Continue.

* = required

Product: Purchasing
Name: CHRIS P SMITH

Last Name:* SMITH First Name:* CHRIS MI: P

SSN: 000001234

Date of Birth: Month: January Day: 1 Year: 1980

Optional 1: North Central Optional 2: Sales

Address 1:* 200 SOUTH SIXTH STREET Address 2: SUITE 200, FLOOR 10

City:* MINNEAPOLIS State/Province:*(if USA or Canada) MN Zip/Postal Code: (* if USA or Canada) 55402

Country:* United States

Work Phone:* 6121231234 Home Phone: 6123454556

Alternate Phone: 6122342345 Fax: 6511231234

Email Address: cpsmith@acme

Demographics Comments:
SALES OFFICE MOVED TO MINNEAPOLIS IN JUNE.

Note: The maximum amount of characters allowed is 254.
Character count = 0

16

File for Later **Cancel Setup**

16. Click the **File for Later** button when you are done. A confirmation message displays.

Active Work Queue

i Account Setup Form has been filed.

[Setup Cardholder Account](#) | [Maintain Cardholder Account](#)

Select a task to work.

Records 1 - 3 of 3 [Refresh List](#)

Task (Select Task)	Request Type	Product	Account Name	Start Date
------------------------------------	------------------------------	-------------------------	------------------------------	----------------------------

Your Program Administrator can now access this information from the active work queue. Your Program Administrator completes the *Account Information*, *Default Accounting Code*, and *Authorization Limits* screens and submits your account application. The application goes through an automated credit evaluation and, if your application meets the credit criteria, we create an account number. We then send the new account number back to the application request in Access Online where your Program Administrator can access the information and communicate the account information to you.

Authorize a Credit Check

Your organization may require you to select whether you will authorize a credit check before processing your account setup for certain types of cards (e.g., a travel card that you will be personally liable for). By selecting to authorize a credit check, you give the bank permission to obtain information about your personal credit history.

The screenshot shows a web form with the following fields and elements:

- Work Phone:*** Input field containing 6121231234
- Home Phone:** Input field containing 6123454556
- Alternate Phone:** Input field containing 6122342345
- Fax:** Input field containing 6511231234
- Email Address:** Input field containing cpsmith@acme
- Demographics Comments:** Text area containing SALES OFFICE MOVED TO MINNEAPOLIS IN JUNE. (Callout 1 points to this field)
- Note:** The maximum amount of characters allowed is 254. Character count = 0
- Authorization Radio Buttons:**
 - I authorize the bank to obtain credit information in connection with this application. (Callout 3 points to this button)
 - I do not authorize the bank to obtain credit information. (Callout 4 points to this button)
- Buttons:** File for Later (Callout 2 points to this button) and Cancel Setup

To authorize a credit check:

1. Repeat the steps in *Complete Your Portion of the Account Setup* on page 2 to complete the demographics information.
2. Select the *I authorize the bank to obtain credit information in connection with this application* radio button.
3. Select the *I do not authorize the bank to obtain credit information* if you do not want to give the bank permission to review your personal credit history. Keep in mind that the bank may not be able process your card account setup without this information.
4. Click the **File For Later** button to save your work and send your portion of the account setup to your Program Administrator for completion.

©2012 U.S. Bank National Association. All trademarks are the property of their respective owners.

You may not reproduce this document, in whole or in part, without written permission.