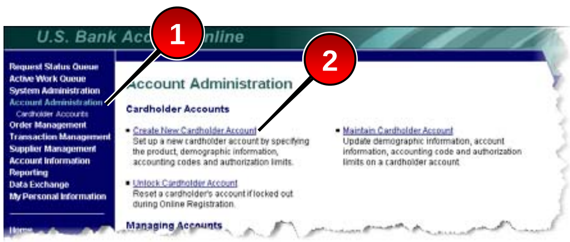
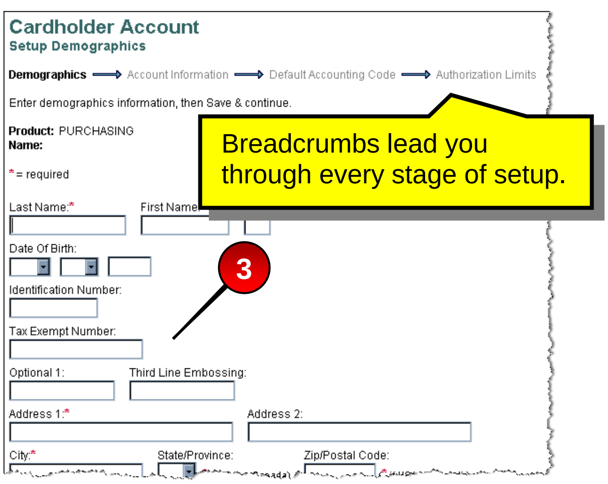
Cardholder Account Setup

You can use this quick reference guide as a fast reminder of the basic steps for completing the cardholder account setup process in Access Online.

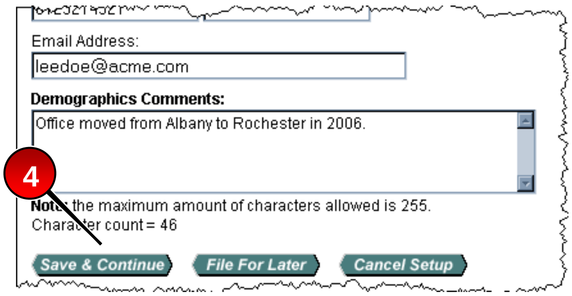
When you set up a new cardholder account, Access Online leads you through a series of screens to ensure that you complete every stage of the process.



1. Select the **Account Administration** high-level task.
2. Click the **Create New Cardholder Account** link.

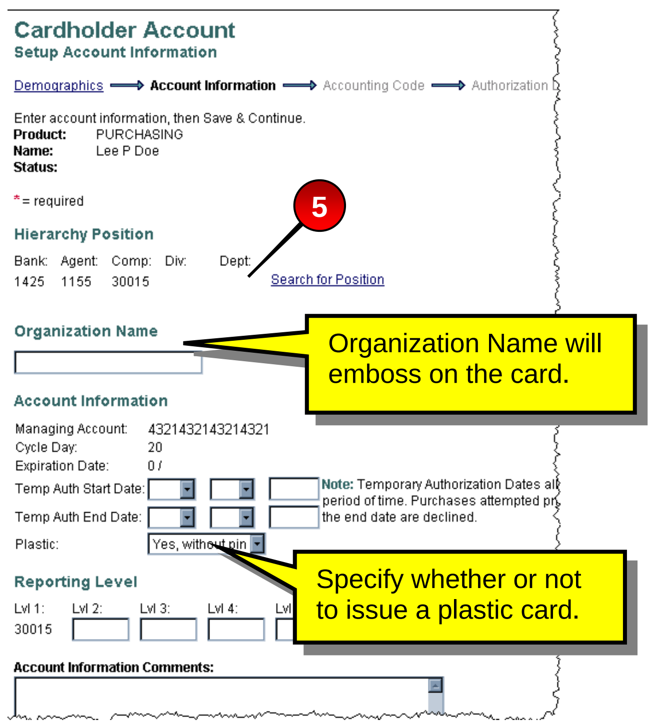


3. Specify information in each required and/or optional field. Required fields have a red asterisk.



4. Click the **Save & Continue** button.

Note: At any point in the setup process, you can click the **File For Later** button to save your work and access it later through the *Active Work Queue*.



5. Specify information in each required and/or optional field, including the processing hierarchy position, general account information, and reporting hierarchy position.

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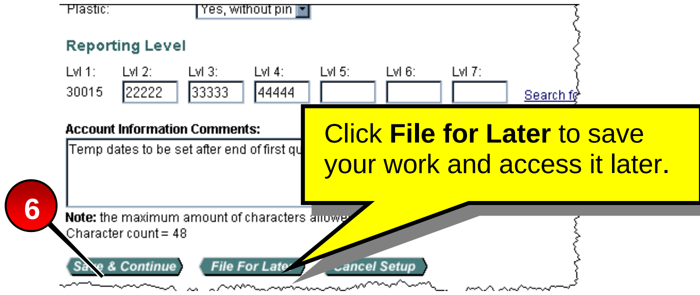
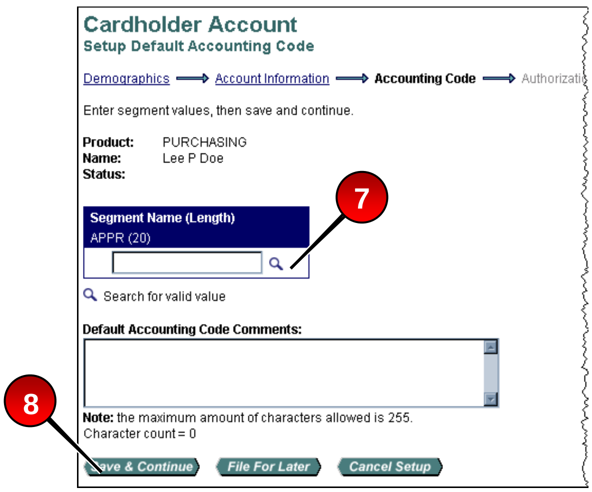


6. Click **Save & Continue**.

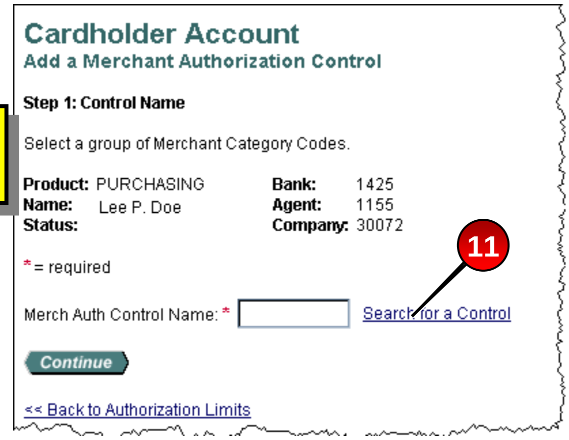


7. Specify the default accounting code, if needed. You may be able to search and select from valid values if you have uploaded values.

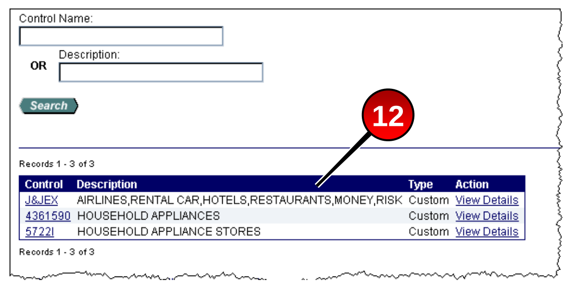
8. Click **Save & Continue**.

9. Specify the authorization limits and velocity limits for the new account.

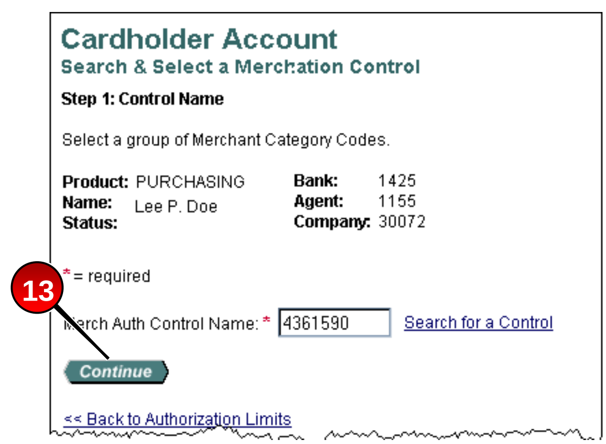
10. To add a merchant authorization control, click the **Add a Control** link.



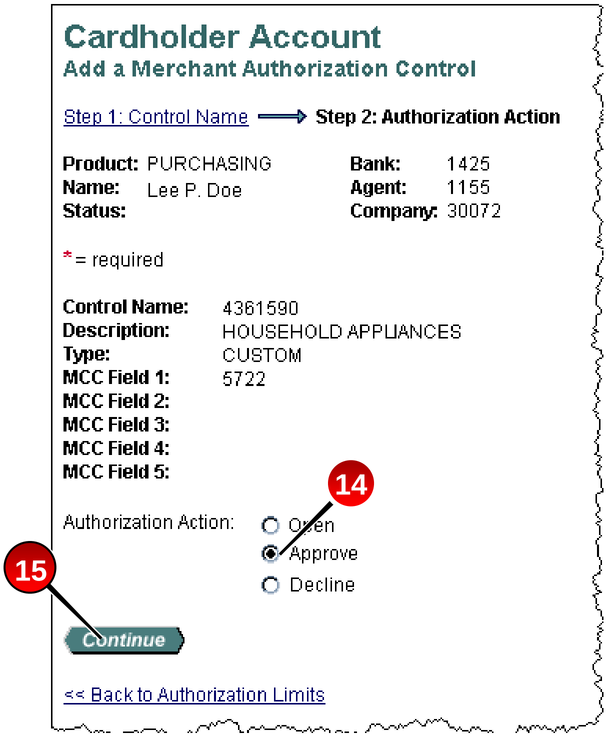
11. Click the **Search for a Control** link.



12. Search and select a control.

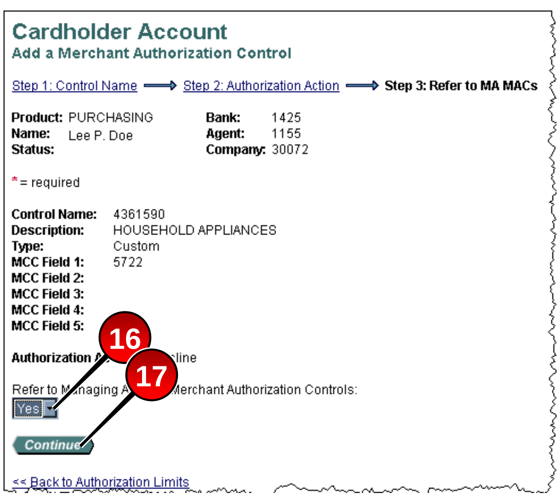


13. Click the **Continue** button.



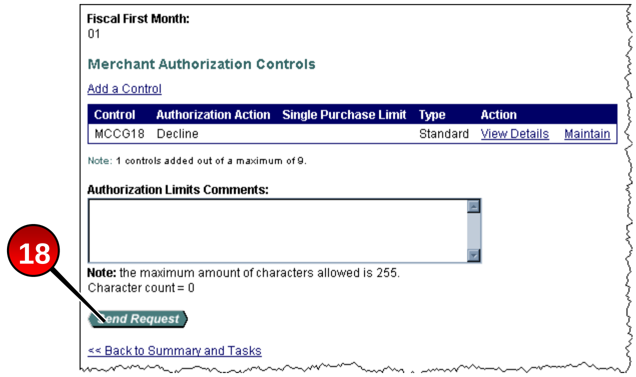
14. Select the *Open*, *Approve*, or *Decline* radio button.

15. Click **Continue**.

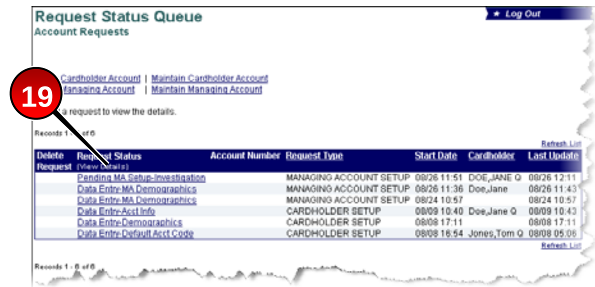


16. Select whether or not to refer this cardholder account to the managing account.

17. Click **Continue**.



18. Click **Send Request**.



19. Access the setup request in your *Request Status Queue*.

➢ *Learn More:* For more detailed information, refer to the *Cardholder Account Setup and Maintenance* web-based training lesson and user guide available at:

https://wbt.access.usbank.com

Contact your relationship manager for the most current passwords.

The training site also has a glossary available.

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