

Setting Up a New Cardholder or Requesting an Additional Card

1. Go to <https://access.usbank.com/cpsApp1/AxolPreAuthServlet?requestCmdId=login> and log in.
2. Select Account Administration
3. Select Create New Cardholder Account

The screenshot shows the usbank Access Online interface. At the top left is the usbank logo and "Access® Online". At the top right is a "Log Out" button with an exit icon. A left-hand navigation menu includes: Request Status Queue, Active Work Queue, System Administration, Account Administration (highlighted with a red arrow), Transaction Management, Account Information, Reporting, Dashboard, Data Exchange, and My Personal Information. Below the navigation menu, the main content area is titled "Account Administration" and contains a message: "Setup for this account has been canceled." Below this is the "Cardholder Accounts" section, which includes three options: "Create New Cardholder Account" (highlighted with a red arrow), "Maintain Cardholder Account", and "Maintain Multiple Cardholder Accounts". The "Create New Cardholder Account" option has a sub-description: "Set up a new cardholder account by specifying the product, demographic information, account information, accounting codes and authorization limits." The "Maintain Cardholder Account" option has a sub-description: "Update demographic information, account information (change account status), accounting codes and authorization limits on a cardholder account." The "Maintain Multiple Cardholder Accounts" option has a sub-description: "Update demographic information, account information, accounting codes, and authorization limits on multiple cardholder accounts by: Selecting Hierarchy Position, Selecting Individual Accounts". At the bottom of the main content area, there is a section titled "Active Work Queue" with a sub-description: "View the tasks to be completed and the progress of the account setup in the Active Work Queue."

4. Fill in the Division with the college, this is **not** optional

- a. District = 01000
- b. Skyline = 02000
- c. Cañada = 02300
- d. CSM = 04000
- e. Bookstore = 05000

5. Enter the Department (this is the ORG) second set of four numbers in the FOAP.

6. Send a Physical Card With This Account – **YES**

7. Select Next

Create New Account



1. Define Product Settings

Please provide your organization's Processing Hierarchy, beginning with Product selection. [i](#)
Required Fields (unless noted as optional)

Product (Bank)
Purchasing - 1425

Agent
8908

Company
38756

Division (optional)

Department (optional)

[Search](#)

Send a Physical Card With This Account?

Physical Card [i](#)

Yes

Cancel

Next

8. Enter First Name, MI (optional) Last Name
9. Enter College address, city, state, zip code, work number (no spaces as they will fill out automatically) and email address

Required Fields (unless noted as optional)

First Name i MI (optional) Last Name i

FirstName LastName

Mailing Address i

Country

Address Line 1

Address Line 2 (optional)

City State ZIP Code

San Mateo

Work Phone

Email Address

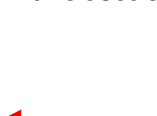
Account Owner's Information Comments (optional)


[Show Optional Fields](#)

10. Select; Show Optional Fields (**DO NOT BY PASS THIS**)

11. For the Social Security Number add five (0) 00000, followed by the last four of the G #, this is the only field you will fill out in this section.


Hide Optional Fields

Social Security Number  Date of Birth

***-**-1111 mm/dd/yyyy 

Optional 1 Optional 2

Personal Phone Additional Phone Fax Number

Mail Card to Alternate Address 

Country
United States

Address Line 1


Address Line 2 (optional)

City State ZIP Code


Select

12. You do not need to fill out anything in Account Details

13. Scroll down and click on **Default Accounting Code**, and fill out as stated on the Procurement Card Application

Default Accounting Code  Editable

Required Fields (unless noted as optional)

Default Accounting Code 

FUND (6) ORGANIZATION (6) ACCOUNT (6)

PROGRAM (6) ACTIVITY (6) (optional)

Default Accounting Code Comments (optional)

14. Click on Authorization Limits and fill out as stated on the Procurement Card Application

15. Fill out Authorization Limits as stated on Procurement Card Application.

Authorization Limits Editable

Required Fields (unless noted as optional)

Account Credit Limit ⓘ

1000

Authorization Limit Comments (optional)

[Show Optional Fields](#)

[Cancel](#) [Save](#) [Next](#)

16. Click on **Show Optional Fields**, and check the box for Single Purchase Limit, **UNLESS**, you are requesting a procurement card for Cañada. For Cañada you must have the Single Purchase Limit box checked, and insert the Single Purchase Limit in the Additional Credit Limits box. It will be \$500.00 unless stated otherwise.

[Hide Optional Fields](#)

Use Values from Managing Account? ⓘ

- Single Purchase Limit
- Velocity Limit
- Merchant Authorization Controls

Additional Credit Limits

Single Purchase Limit ⓘ

0

First Fiscal Month

January

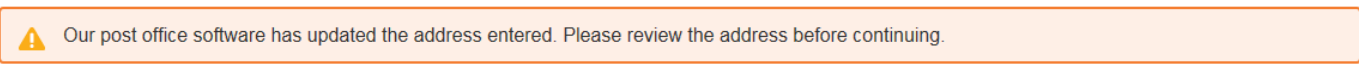
17. Fill out the Merchant Authorization Control exactly as filled in below;

Merchant Authorization Control (MAC) : Existing Controls				
Control and Description	Single Purchase Limit	Authorization Action	Use Managing Account MAC as MAC	Action
smccdex	..	Decline	No	Add

Cancel Save Next

18. Select “Next” and Review to make sure everything entered is correct. **DO NOT HIT SAVE!**


19. This warning will come up, please continue



20. Scroll back to “Next” and review

21. Scroll to bottom and select “Submit”, and you will get this screen;

4. Confirmation



New account for FirstName LastName has been submitted.

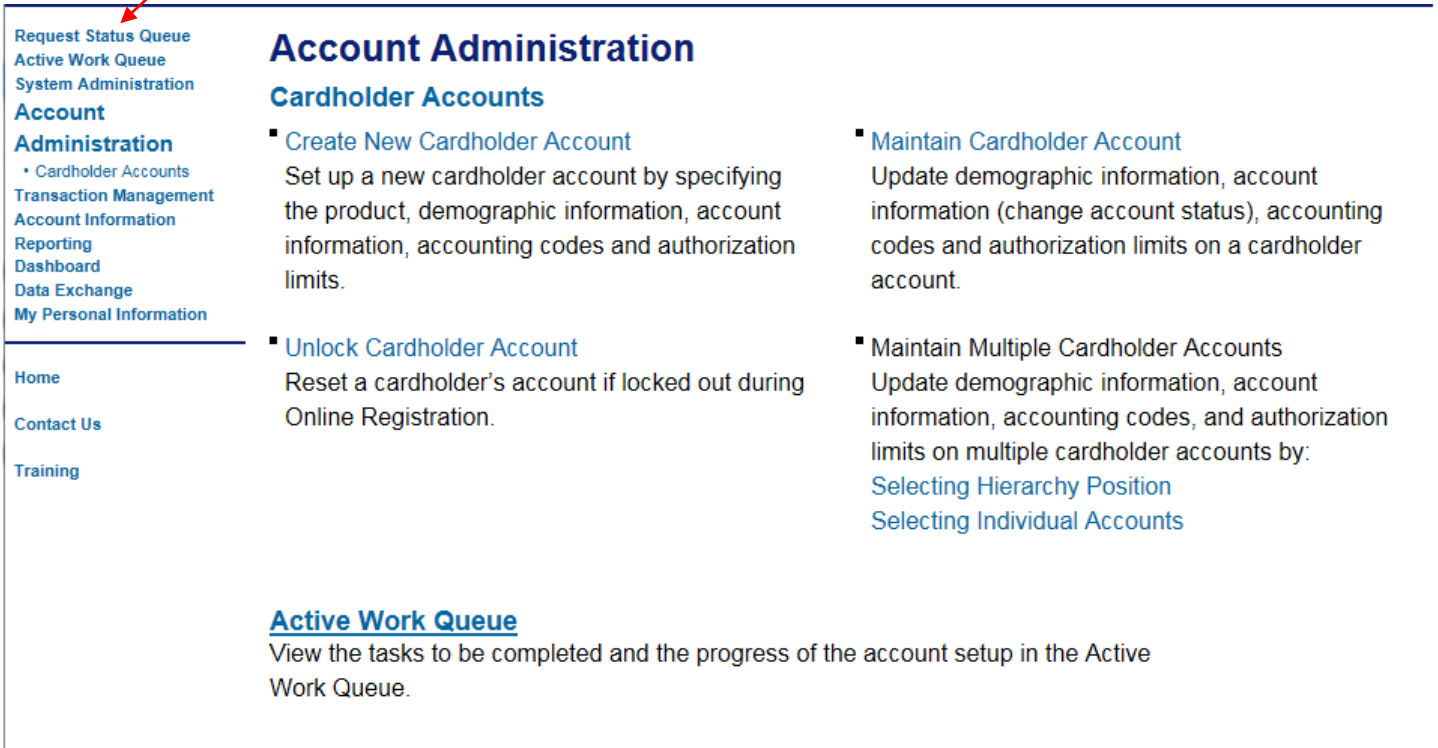
Job ID : pvm:0a121mdhg

Exit Create New

22. Click on “Exit”

23. Email Bob Domenici to let him know that an application was submitted and attach the signed application.

24. Go to **Request Status Queue** and make sure the procurement card you processed is there.



The screenshot shows a web application interface. At the top, a navigation bar contains several links: Request Status Queue, Active Work Queue, System Administration, Account, Administration, Transaction Management, Account Information, Reporting, Dashboard, Data Exchange, and My Personal Information. A red arrow points from the text above to the 'Request Status Queue' link. Below the navigation bar is a sidebar with links for Home, Contact Us, and Training. The main content area is titled 'Account Administration' and 'Cardholder Accounts'. It contains three main sections: 'Create New Cardholder Account', 'Unlock Cardholder Account', and 'Maintain Cardholder Account'. Each section has a brief description of its function. Below these sections is a section titled 'Active Work Queue' with a description of its purpose.

Request Status Queue
Active Work Queue
System Administration
Account
Administration
• Cardholder Accounts
Transaction Management
Account Information
Reporting
Dashboard
Data Exchange
My Personal Information

Home
Contact Us
Training

Account Administration

Cardholder Accounts

- **Create New Cardholder Account**
Set up a new cardholder account by specifying the product, demographic information, account information, accounting codes and authorization limits.
- **Unlock Cardholder Account**
Reset a cardholder’s account if locked out during Online Registration.
- **Maintain Cardholder Account**
Update demographic information, account information (change account status), accounting codes and authorization limits on a cardholder account.
- **Maintain Multiple Cardholder Accounts**
Update demographic information, account information, accounting codes, and authorization limits on multiple cardholder accounts by:
[Selecting Hierarchy Position](#)
[Selecting Individual Accounts](#)

Active Work Queue

View the tasks to be completed and the progress of the account setup in the Active Work Queue.

25. All cards will be sent to the District Office and delivered to the Colleges.