

USDA
Quick Guide: Modifying a Managing
Account



April 2010

Presented by

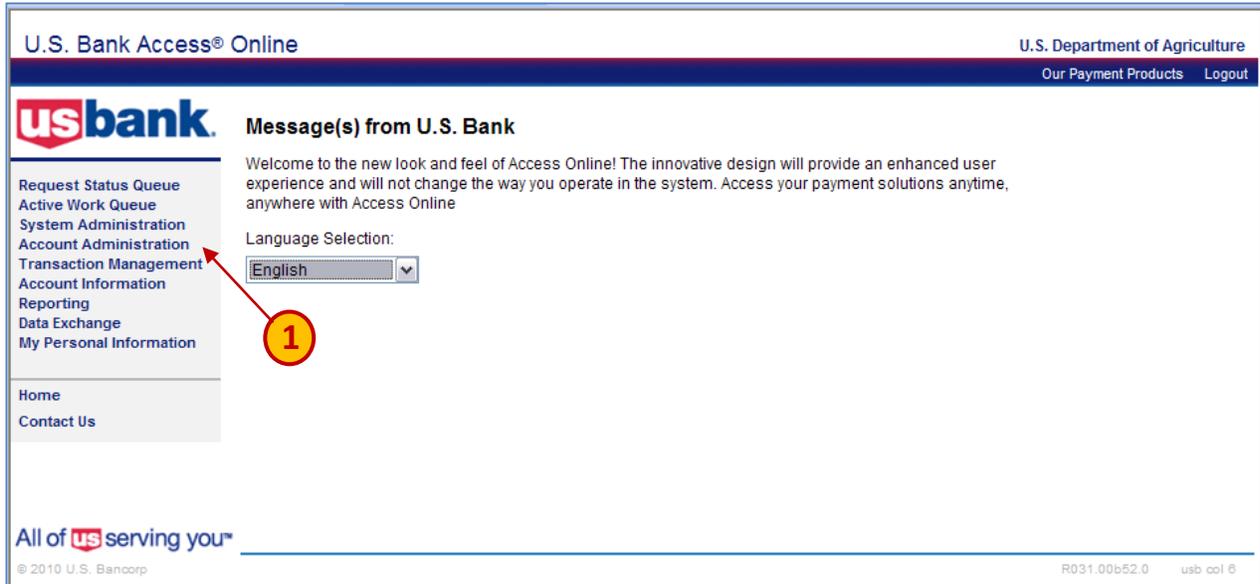
Departmental Management's Office of Procurement and Property Management

Property Management Division

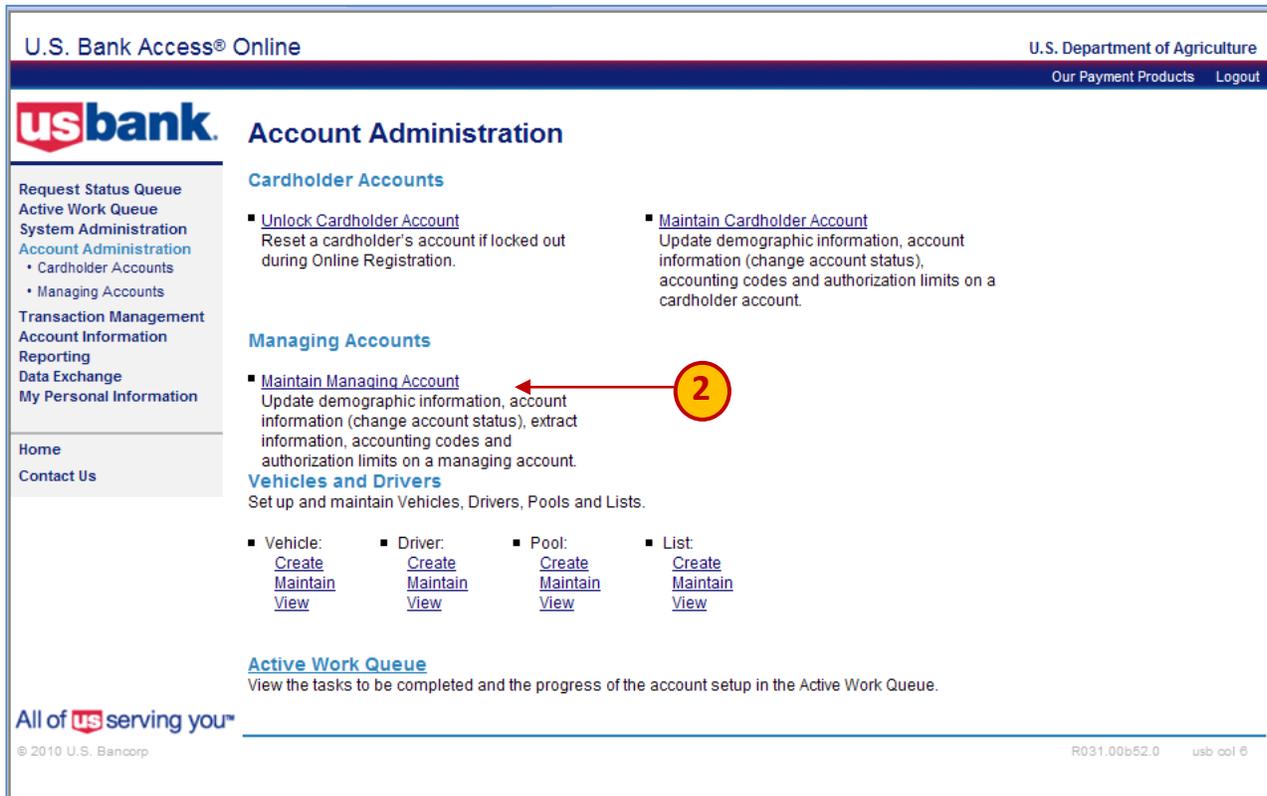
Charge Card Service Center

Quick Guide: Modifying a Managing Account

Step 1: To begin, click the Account Administration link on the left hand side of the page.



Step 2: Click the Maintain Managing Account link.



Step 3: Enter one of the following into the space provided:

- Managing Account Number
- Managing Account Name
- Manager’s First or Last Name/Initial
- Manger’s Company Number.

Then click Search.

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usbank Managing Accounts
Search & Select a Managing Account

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

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Contact Us

Managing Account Search
Search for a Managing Account by Managing Account Number, Name, or Company Number.

Managing Account Number:

Managing Account Name:
OR

Last Name: First Name:

OR

Company Number:
OR

Search

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Step 4: From the list that displays, click the account number link for the account you want to modify.

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Search & Select a Managing Account

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Managing Account Search
Search for a Managing Account by Managing Account Number, Name, or Company Number.

Managing Account Number:

Managing Account Name:
OR

Last Name: First Name:

OR

Company Number:
OR

Search

Records 1 - 6 of 6

Account Number	Name
448697455	RENE VANDENHEUVEL
448697455	HEARSELL VANLUVEN
448697455	SANDRA VELASCO
448697455	VERONICA NELSON
448697455	VERONICA NELSON
448697455	SANDRA VINSON

Step 5: Select the link in the task column that you want to modify.

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usbank **Managing Accounts**
Search & Select a Managing Account

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Card Account Number: ***** [Switch Accounts](#)

Select a task to maintain its contents. Repeat if changes are required in another task. You can also view account requests in the [request status queue](#).

Product: Fleet Bank: 8201
Name: -- -OPEN Agent: 0950
Status: -- -OPEN Company: 12650

Task	Description
Demographic Information	Input account name, address, and other contact information.
Account Information	Input other account information such as account status, hierarchy position, cycle day, and open date.
Fleet Information	Input fleet information such as vehicle or driver number, service restrictions, and prompts.
Default Accounting Code	Input the default accounting code assigned to the account.
Authorization Limits	Input authorization limit information such as credit limit, single purchase limit, and available credit.

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Below describes which types of account modifications are available within each link:

- The Demographic Information link allows modification to the account name and contact information.
- The Account Information link allows modification to other account information such as account status, hierarchy position, cycle day, and open date.
- The Fleet Information link allows modification to fleet information such as vehicle or driver number, service restrictions, and prompts.
- The Default Accounting Code link allows modification to the default accounting code assigned to the account.
- The Authorization Limits link allows modification to the limit information such as credit limit, single purchase limit, and available credit.

Step 6: Make any necessary changes to the manager’s account and then click send request.

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usbank **Managing Accounts**
Maintain Demographics

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Active Work Queue
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Managing Account Number: VERONICA NELSON NELSON [Switch Accounts](#)

Maintain demographic information, then send the request.

Product: Fleet **Bank:** 8201
Name: VERONICA NELSON NELSON **Agent:** 0970
Status: ** -OPEN **Company:** 12529

* = required

Last Name:* First Name:* MI:

Date of Birth:
Month Day Year

Identification Number:

Tax Exempt Number:

Optional 1: Third Line Embossing:

Address 1:* Address 2:

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

Country:*

Work Phone:* Home Phone:

Alternate Phone: Fax:

Email Address:

Demographics Comments:

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

[Send Request](#) ← **6**

[<< Back to Summary and Tasks](#)

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Note: Maintenance changes to demographic, account information, default accounting codes and authorization limits take place in real time.