

# Close and Reopen Accounts

You can use this quick reference guide as a fast reminder of the basic steps for closing and reopening accounts.

**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.
- Maintain Cardholder Account**  
Update demographic information, account information (change account status), accounting codes and authorization limits on a cardholder account.
- Unlock Cardholder Account**  
Reset a cardholder's account if locked out during Online Registration.

1. Select **Account Administration** and then click the **Maintain Cardholder Account** link.

**Cardholder Accounts**  
Summary and Tasks

Account Number: 4246040009598956, MIGUEL BUCHANAN

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: Purchasing Bank: 1425  
Name: MIGUEL BUCHANAN Agent: 7548  
Status: \*-OPEN Company: 39649

Task	Description
<a href="#">Demographic Information</a>	Input account name, address, and other contact information.
<a href="#">Account Information</a>	Input other account information such as account status, hierarchy position, cycle day, and open date.
<a href="#">Default Accounting Code</a>	Input the default accounting code assigned to the account.
<a href="#">Authorization Limits</a>	Input authorization limit information such as credit limit, single purchase limit, and available credit.

2. Click the **Account Information** link.

**Cardholder Account**  
Maintain Account Information

Account Number: 4246040009598956, MIGUEL BUCHANAN

Maintain account information, then send the request.

Product: Purchasing Bank: 1425  
Name: MIGUEL BUCHANAN Agent: 7548  
Status: \*-OPEN Company: 39649

\* = required

Account Status: \*-OPEN  
Hierarchy Position: \*-OPEN

Bank	Agent	Company	Division	Department
1425	7548	39649	00000	0000

Organization Name:

Account Information  
Managing Account: 4246044555587785  
Cycle Day: 26

- To close an account, select **T9-TERMINATED** for a permanent closing or **V9-TEMP CLOSED** for a temporary closing.
- To reopen an account, select **OPEN**.

Account Status: T9-TERMINATED

Hierarchy Position

Bank	Agent	Company	Division	Department
1425	7548	39649	00000	0000

Organization Name:

Account Information  
Managing Account: 4246044555587785  
Cycle Day: 26  
Expiration Date: 01/2006  
Open Date: 01/24/2003  
Temp Auth Start Date:    Note: Temporary Authorization Date for a specific period of time. Purcha to the start date and after the end da  
Temp Auth End Date:     
Activated: Y  
Plastic: N  
Pin: N  
Checks: N  
Telecom: N  
Telecom Status:  
Autopay:

Reporting Level

Lvl 1:	Lvl 2:	Lvl 4:	Lvl 5:	Lvl 6:	Lvl 7:
39649	11223	55779	99999	00000	00000

Send Request

5. Click the **Send Request** button.



**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 program administrator for the most current passwords.

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