



## Create New Account

1

2

3

4

### 1. Define Product Settings

Required Fields (unless mentioned as optional)

Product (Bank)

1234



Agent

1456

Company

5674

Department (optional)

1456

Division (optional)

3321

[Search](#)

Plastic

Yes



## Create New Account

1

2

3

4

### 1. Define Product Settings

Required Fields (unless mentioned as optional)

#### Cancel & Leave Account Set Up



Are you sure you want to cancel and leave the Create New Account Process?

**All the information entered so far will be lost.**

**Leave Account Set up**

3321

Search

Plastic

Yes



Fleet Card Type



## Create New Account

1

2

3

4

### — Product Settings Summary

Product

Purchasing

Processing Hierarchy

1234-4321-23456-34567-6789

Managing Account

\*\*\*\*\_\*\*\*\*\_\*\*\*\*-6186

Managing Account ID

112095429954

Managing Account Name

BPS TEST LM C-CARD

Plastic

Yes

## 2. Enter Account Information

### — Account Owner's Information

In Progress

Required Fields (unless mentioned as optional)

First Name

MI (Optional)

Last Name

Vehicle Name

Social Security Number

Date of Birth

Country

 ▼

Address Line 1

Address Line 2 (optional)

City

State

Zip

Work Phone

Home Phone

Email Address

Authorization to Obtain/Decline Credit Info

Card Holder Category

## Comments (optional)

### Show Optional Fields

- + Account Details** In Progress
- + Authorization Limits** In Progress
- + Fleet Information** In Progress

Continue

Save For Later

Cancel



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Hide Optional Fields

Optional 1 (Client Defined)

United States

Optional 2 (Client Defined)

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Additional Phone

\_\_\_\_-\_\_\_\_-\_\_\_\_

Fax Number

\_\_\_\_-\_\_\_\_-\_\_\_\_

---

Identification Number

\_\_\_\_-\_\_\_\_-\_\_\_\_

Tax Exempt Number

\_\_\_\_-\_\_\_\_-\_\_\_\_

---

Alternate Address

Country

United States



Address Line 1

Address Line 2 (optional)

City

State

 ▼

Zip

**+** Account Details

In Progress

**+** Authorization Limits

In Progress

**+** Fleet Information

In Progress

Continue

Save For Later

Cancel





## Create New Account

1

2

3

4

+ Product Settings Summary

### 2. Enter Account Information

- Account Owner's Information

In Progress

Required Fields (unless mentioned as optional)

First Name

MI (Optional)

Last Name

Vehicle Name

Social Security Number



## Create New Account

1

2

3

4

+ Product Settings Summary

### 2. Enter Account Information

- Account Owner's Information In Progress

+ Account Details In Progress

+ Authorization Limits In Progress

Account Credit Limit i

\$4,500

Comments (optional)

[Show Optional Fields](#)

+ Fleet Information In Progress

Continue



## Create New Account

**+** Product Settings Summary

### Search for Reporting Hierarchy Position

- Select the hierarchy level you wish to locate, and enter any known or partial values, then search.

#### SEARCH CRITERIA

Product: 1234

---

Hierarchy Level

Level 5



Level 1

Level 2

Level 3

Level 4

Level 5

Level 6

Level 7

Search

Results

Results 1-6 of 6

All positions that match your search criteria.

Select	Bank	Level 1	Level 2
<input type="radio"/>	1234	7653	5432
<input type="radio"/>	1234	7653	5432
<input type="radio"/>	1234	7653	5432
<input checked="" type="radio"/>	1234	7653	5432
<input type="radio"/>	1234	7653	5432
<input type="radio"/>	1234	7653	5432

## Results

Results 1-6 of 6

All positions that match your search criteria.

Select	Bank	Level 6	Level 7
<input type="radio"/>	1234	7653	5432
<input type="radio"/>	1234	7653	5432
<input type="radio"/>	1234	7653	5432
<input checked="" type="radio"/>	1234	7653	5432
<input type="radio"/>	1234	7653	5432
<input type="radio"/>	1234	7653	5432

< Previous

1 - 2 - 3 - 4 - 5 >> 35

Next >

Continue

Back to Account Details



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## Create New Account

+ Product Settings Summary

### Search for Reporting Hierarchy Position

- Select the hierarchy level you wish to locate, and enter any known or partial values, then search.

#### SEARCH CRITERIA

Product: 1234

---

#### Hierarchy Level

Level 5



Level 1

Level 2

Level 3

Level 4



## SEARCH CRITERIA

Results

Results 1-6 of 6

All positions that match your search criteria.

Select	Bank	Level 1	Level 2
<input type="radio"/>	1234	7653	5432
<input type="radio"/>	1234	7653	5432
<input type="radio"/>	1234	7653	5432
<input checked="" type="radio"/>	1234	7653	5432
<input type="radio"/>	1234	7653	5432
<input type="radio"/>	1234	7653	5432

< Previous

1 - 2 - 3 - 4 - 5 >> 35

Next >

Continue

Back to Account Details



## Create New Account

1

2

3

4

+ Product Settings Summary

### Account Credit Limit



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\$4,500

Comments (optional)

Show Optional Fields

+ Fleet Information

In Progress

Continue



2 Leave Create New Account Process



You are about to cancel and leave the Create New Account Process.

All the information entered so far will be lost.

You can choose to save the application in progress and access it at a later time.

You can also choose to start a new create account application.

Leave Account Set up

Save for Later

Close



## Create New Account

1

2

3

4

### 3. Review Information

Required Fields (unless mentioned as optional)

#### Define Product Settings

Product

Purchasing

Processing Hierarchy

1234-4321-23456-34567-6789

Managing Account

\*\*\*\*\_\*\*\*\*\_\*\*\*\*-6186

Managing Account ID

112095429954

Managing Account Name

BPS TEST LM C-CARD

Plastic

Yes

### Enter Account Information

Account Owner's Information

[Edit](#)

Name

Bourne, Jason M

Vehicle Name

Lorem Ipsum

Address

Lorem Ipsum

Lorem Ipsum

**Social Security Number**

000-00-0000

**Date of Birth**

mm/dd/yyyy

**Work Phone**

000-000-0000

**Home Phone**

000-000-0000

**Email**

XYZ@email.com

**Authorization to obtain/decline  
credit information**

Yes, allow credit score access

**Card Holder Category**

Heavy Traveler

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**Alternate Address**

Lorem Ipsum

Lorem Ipsum

Lorem Ipsum

**Alternative Phone**

000-000-0000

**Fax Number**

000-000-0000

**Identification Number**

000-000-0000

Tax Exempt Number

0000000000

Optional 1 (Client defined)

0000000000

Optional 2 (Client defined)

0000000000

### Comments

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### Account Details

[Edit](#)

Cycle Day

60

Expiration Date

mm/dd/yyyy

Check Required

Yes

Checks Valid Number of Days

000

Default Accounting Code

Project (4)

2222

Index (3)

333

Business Unit (3)

33

Cost Center (7)

777

Authorization Limits

[Edit](#)

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Account Credit Limit

\$4,500

Refer to limits based on Managing Account for  
Single Purchase Limit

Velocity Limits

Merchant Authorization Controls

Single Purchase Limit

\$4,500

Cash

0

Velocity Limit

Daily Dollar Amount

0

Daily Transaction Limit

0

**Vehicle Number**

00000000

**Assigned Driver (s)**

00000000

**Driver Number**

00000000

**Assigned Vehicles**

00000000

**Assigned List of Drivers**

00000000

**Assigned List of Vehicles**

Lorem Ipsum

**Prompts**

No

**Exemptions Reported**

Yes

**Comments**

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## Create New Account

1

2

3

4

### 4. Confirmation

New account for Jason Bourne has been submitted.

Job ID: 0000000000000000

Create Another Account

Leave Account Set Up

Send Email To Account Owner



## Create New Account

1

2

3

4

+ Product Settings Summary

### 2. Enter Account Information

- Account Owner's Information

In Progress

Required Fields (unless mentioned as optional)



Lorem ipsum dolor sit amet, consectetur adipiscing elit,

First Name

Jason

MI (Optional)

Last Name

Vehicle Name

Social Security Number





## Create New Account

1

2

3

4

+ Product Settings Summary

### 2. Enter Account Information

- Account Owner's Information

In Progress

Required Fields (unless mentioned as optional)

First Name

Jason

MI (Optional)

Last Name

Bourne

Social Security Number

000-00-000

Social Security Number should be 9 Characters.  
(Example: 000-00-0000)

Date of Birth

mm/dd/yyyy

Leave Setup

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Logout

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Lorem Ipsum

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