

SmartPay 2 Travel Card Program for DoD

Bulk Account Maintenance

Bulk Account Maintenance



20001-TONY SWANN

- [Inbox](#) ▾
- [Card Management](#) ▾
- [Hierarchy](#) ▾
- [Reporting](#) ▾
- [Inquiry](#) ▾
- [Assistance](#) ▾

Note: If you need any assistance, please contact the CitiDirect Helpdesk via our toll free number at 1-866-670-6462, option 4, for international calls - dial collect at (757) 853-2467.

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In this lesson you will learn how to use Bulk Account Maintenance.

Let's Begin!



Bulk Account Maintenance

CitiDirect® Card Management System

[What's New](#) [Help](#) [Home](#) [Logout](#)



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[Inbox](#) [Card Management](#) [Hierarchy](#) [Reporting](#) [Inquiry](#) [Assistance](#)

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Done



Internet



100%

Step 1

What You Need to Know? This function allows you to perform the same action to multiple accounts at once. A maximum of 3000 accounts can be selected for each bulk account maintenance request. If your request is for 100 accounts or less, the request will be processed immediately. +Request of more than 100 accounts will require more processing time.



Bulk Account Maintenance



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[Inbox](#) ▾

[Card Management](#) ▾

[Hierarchy](#) ▾

[Reporting](#) ▾

[Inquiry](#) ▾

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Step 2

Click the **Card Management** link.



Bulk Account Maintenance



[Inbox](#) [Card Management](#) [Hierarchy](#) [Reporting](#) [Inquiry](#) [Assistance](#)

- [Account Management](#)
- [Maintenance Log](#)
- [MCCG Management](#)

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Step 3

Click the **Account Management** link.



Bulk Account Maintenance



[Inbox](#) ▾ [Card Management](#) ▾ [Hierarchy](#) ▾ [Reporting](#) ▾ [Inquiry](#) ▾ [Assistance](#) ▾

- [Account Management](#) ▸
 - [New Application](#)
 - [Modify Account](#)
 - [Bulk Account Maintenance](#)
 - [Bulk Account Maintenance Upload](#)
 - [View Account](#)
 - [Transfer Account](#)
- [Maintenance Log](#)
- [MCCG Management](#)

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Step 4

Click the **Bulk Account Maintenance** link.



Bulk Account Maintenance

CitiDirect® Card Management System

What's New Help Home Logout



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Inbox Card Management Hierarchy Reporting Inquiry Assistance

Card Management - Account Management - Bulk Account Maintenance

A maximum of 3000 accounts can be selected for each bulk account maintenance request. If you have selected less than or equal to 100 accounts then the maintenance would be performed immediately. Selection of more than 100 accounts will require additional processing time. Click [here](#) to view the status report of Bulk Maintenance requests over 100 accounts.

The following accounts will not be considered for bulk account maintenance:

1. Accounts locked for processing pending request.
2. Accounts status is Lost or Stolen.

Numeric Sort Alpha Sort

(+) – Indicates that some of the subunits of collapsed unit have been changed.

select	business unit	accounts		
		in unit	in unit & subunits	selected
<input type="checkbox"/>	20099 - AGENCY 99 IBT	0	97	0

Total number of accounts selected: 0

exclude accounts

continue

Internet

100%

Step 5

The Bulk Account Maintenance screen displays. It defaults showing your hierarchy and the total number of accounts you have in your hierarchy/unit as well as the total number of accounts in both your hierarchy/unit and your lower level hierarchies/subunits.

Clicking on the link for your hierarchy drills down to display any lower level hierarchies/subunits that you might have along with the number of accounts in each of those hierarchies/subunits.

Note: If your default hierarchy level does not display as a hyperlink then you do not have any lower level hierarchies within your span of control.



Bulk Account Maintenance



- Inbox
- Card Management
- Hierarchy
- Reporting
- Inquiry
- Assistance

Card Management - Account Management - Bulk Account Maintenance

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Numeric Sort Alpha Sort

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select	business unit	accounts		
		in unit	in unit & subunits	selected
<input type="checkbox"/>	20099 - AGENCY 99 IBT	0	97	0

Total number of accounts selected: 0

exclude accounts

continue

Step 6

Click the **20099 - AGENCY 99 IBT** link.



Bulk Account Maintenance



Card Management - Account Management - Bulk Account Maintenance

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Numeric Sort Alpha Sort

(+) – Indicates that some of the subunits of collapsed unit have been changed.

select	business unit	accounts		
		in unit	in unit & subunits	selected
<input type="checkbox"/>	20099 - AGENCY 99 IBT	0	97	0
<input type="checkbox"/>	01299 - COMP A L2 IBT	13	24	0
<input type="checkbox"/>	02299 - COMP B L2 IBT	18	28	0
<input type="checkbox"/>	03299 - COMP C L2 IBT	13	17	0
<input type="checkbox"/>	04299 - COMP D L2 IBT	12	17	0
<input type="checkbox"/>	05299 - INDIES L2 IBT	0	11	0

Total number of accounts selected: 0

exclude accounts

continue

Step 7

Click the **03299 - COMP C L2 IBT** link.



Bulk Account Maintenance



Card Management - Account Management - Bulk Account Maintenance

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The following accounts will not be considered for bulk account maintenance:

1. Accounts locked for processing pending request.
2. Accounts status is Lost or Stolen.

Numeric Sort Alpha Sort

(+) – Indicates that some of the subunits of collapsed unit have been changed.

select	business unit	accounts		
		in unit	in unit & subunits	selected
<input type="checkbox"/>	20099 - AGENCY 99 IBT	0	97	0
<input type="checkbox"/>	01299 - COMP A L2 IBT	13	24	0
<input type="checkbox"/>	02299 - COMP B L2 IBT	18	28	0
<input type="checkbox"/>	03299 - COMP B L2 IBT	13	17	0
<input checked="" type="checkbox"/>	03399 - COMP C L3 IBT	0	4	0
<input type="checkbox"/>	04299 - COMP D L2 IBT	12	17	0
<input type="checkbox"/>	05299 - INDIES L2 IBT	0	11	0

Total number of accounts selected: 0

exclude accounts

continue



Step 8

Click the **03399 - COMP C L3 IBT** option.

Bulk Account Maintenance



Card Management - Account Management - Bulk Account Maintenance

A maximum of 3000 accounts can be selected for each bulk account maintenance request. If you have selected less than or equal to 100 accounts then the maintenance would be performed immediately. Selection of more than 100 accounts will require additional processing time. Click [here](#) to view the status report of Bulk Maintenance requests over 100 accounts.

The following accounts will not be considered for bulk account maintenance:

1. Accounts locked for processing pending request.
2. Accounts status is Lost or Stolen.

Numeric Sort Alpha Sort

(+) – Indicates that some of the subunits of collapsed unit have been changed.

select	business unit	accounts		
		in unit	in unit & subunits	selected
<input type="checkbox"/>	20099 - AGENCY 99 IBT	0	97	4
<input type="checkbox"/>	01299 - COMP A L2 IBT	13	24	0
<input type="checkbox"/>	02299 - COMP B L2 IBT	18	28	0
<input type="checkbox"/>	03299 - COMP C L2 IBT	13	17	4
<input checked="" type="checkbox"/>	03399 - COMP C L3 IBT	0	4	4
<input type="checkbox"/>	04299 - COMP D L2 IBT	12	17	0
<input type="checkbox"/>	05299 - INDIES L2 IBT	0	11	0

Total number of accounts selected: 4

exclude accounts

continue

Step 9

Once the hierarchy level, where the bulk maintenance is to be performed, has been selected the system will tell you the total number of accounts that were selected.

Note: It is recommended that you select the "exclude accounts" button from this point instead of "continue". Exclude accounts allows you to see a list of the card accounts selected instead of taking you directly to the maintenance screen.



Bulk Account Maintenance



Card Management - Account Management - Bulk Account Maintenance

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2. Accounts status is Lost or Stolen.

Numeric Sort Alpha Sort

(+) – Indicates that some of the subunits of collapsed unit have been changed.

select	business unit	accounts		
		in unit	in unit & subunits	selected
<input type="checkbox"/>	20099 - AGENCY 99 IBT	0	97	4
<input type="checkbox"/>	01299 - COMP A L2 IBT	13	24	0
<input type="checkbox"/>	02299 - COMP B L2 IBT	18	28	0
<input type="checkbox"/>	03299 - COMP C L2 IBT	13	17	4
<input checked="" type="checkbox"/>	03399 - COMP C L3 IBT	0	4	4
<input type="checkbox"/>	04299 - COMP D L2 IBT	12	17	0
<input type="checkbox"/>	05299 - INDIES L2 IBT	0	11	0

Total number of accounts selected: 4

Step 10

Click the **exclude accounts** button.



Bulk Account Maintenance



Card Management - Account Management - Bulk Account Maintenance

A maximum of 3000 accounts can be selected for each bulk account maintenance request. If you have selected less than or equal to 100 accounts then the maintenance would be performed immediately. Selection of more than 100 accounts will require additional processing time.

Last Name: First Name:
Account Number: Active Status Indicator:
Processor Hierarchy: 20099

‡ A double dagger indicates a pending maintenance request field.

<input checked="" type="checkbox"/> account number	name	account status	hierarchy	last bulk maintenance	active
<input checked="" type="checkbox"/> xxxxxxxxxxx050019	Test Account	-- Open	20099 03299 03399 03499 00000 00000 00000		Deactive
<input checked="" type="checkbox"/> xxxxxxxxxxx002000	Test Account	T2 - CLOSED - ReturnMail	20099 03299 03399 03499 00000 00000 00000		Active
<input checked="" type="checkbox"/> xxxxxxxxxxx850867	Testing Gtc Cosa	-- Open	20099 03299 03399 03499 00000 00000 00000		Deactive
<input checked="" type="checkbox"/> xxxxxxxxxxx050043	L7 Name	-- Open	20099 03299 03399 03499 03699 03699 03799		Active

(1 - 4 of 4)

Step 11

In reviewing the list of accounts selected, you may find that some of the accounts may not require the action you are about to perform.

Note: Deselecting an account removes it from the pool of accounts that are about to have a certain action performed on them.



Bulk Account Maintenance



- Inbox
- Card Management
- Hierarchy
- Reporting
- Inquiry
- Assistance

Card Management - Account Management - Bulk Account Maintenance

A maximum of 3000 accounts can be selected for each bulk account maintenance request. If you have selected less than or equal to 100 accounts then the maintenance would be performed immediately. Selection of more than 100 accounts will require additional processing time.

Last Name: First Name:
Account Number: Active Status Indicator:
Processor Hierarchy: 20099

* A double dagger indicates a pending maintenance request field.

<input checked="" type="checkbox"/>	account number	name	account status	hierarchy	last bulk maintenance	active
<input checked="" type="checkbox"/>	xxxxxxxx050019	Test Account	-- Open	20099 03299 03399 03499 00000 00000 00000		Deactive
<input checked="" type="checkbox"/>	xxxxxxxx002000	Test Account	T2 - CLOSED - ReturnMail	20099 03299 03399 03499 00000 00000 00000		Active
<input checked="" type="checkbox"/>	xxxxxxxx850807	Testing Gtc Ccsc	-- Open	20099 03299 03399 03499 00000 00000 00000		Deactive
<input checked="" type="checkbox"/>	xxxxxxxx050043	L7 Name	-- Open	20099 03299 03399 03499 03699 03899 03799		Active

(1 - 4 of 4)

Step 12

Click in the checkbox for **xxxxxxxx050019** to remove the check.



Bulk Account Maintenance



- Inbox
- Card Management
- Hierarchy
- Reporting
- Inquiry
- Assistance

Card Management - Account Management - Bulk Account Maintenance

A maximum of 3000 accounts can be selected for each bulk account maintenance request. If you have selected less than or equal to 100 accounts then the maintenance would be performed immediately. Selection of more than 100 accounts will require additional processing time.

Last Name: First Name:
Account Number: Active Status Indicator:
Processor Hierarchy: 20099

‡ A double dagger indicates a pending maintenance request field.

<input checked="" type="checkbox"/>	account number	name	account status	hierarchy	last bulk maintenance	active
<input type="checkbox"/>	xxxxxxxx050019	Test Account	-- Open	20099 03299 03399 03499 00000 00000 00000		Deactive
<input checked="" type="checkbox"/>	xxxxxxxx002000	Test Account	T2 - CLOSED - ReturnMail	20099 03299 03399 03499 00000 00000 00000		Active
<input checked="" type="checkbox"/>	xxxxxxxx850867	Testing Gtc Ccra	-- Open	20099 03299 03399 03499 00000 00000 00000		Deactive
<input checked="" type="checkbox"/>	xxxxxxxx050043	L7 Name	-- Open	20099 03299 03399 03499 03699 03699 03799		Active

(1 - 4 of 4)

Step 13

Click in the checkbox for **xxxxxxxx850867** to remove the check.



Bulk Account Maintenance



Card Management - Account Management - Bulk Account Maintenance

A maximum of 3000 accounts can be selected for each bulk account maintenance request. If you have selected less than or equal to 100 accounts then the maintenance would be performed immediately. Selection of more than 100 accounts will require additional processing time.

Last Name: First Name:
Account Number: Active Status Indicator:
Processor Hierarchy: 20099

†A double dagger indicates a pending maintenance request field.

<input checked="" type="checkbox"/>	<u>account number</u>	<u>name</u>	<u>account status</u>	<u>hierarchy</u>	<u>last bulk maintenance</u>	<u>active</u>
<input type="checkbox"/>	xxxxxxxx050019	Test Account	-- Open	20099 03299 03399 03499 00000 00000 00000		Deactive
<input checked="" type="checkbox"/>	xxxxxxxx002000	Test Account	T2 - CLOSED - ReturnMail	20099 03299 03399 03499 00000 00000 00000		Active
<input type="checkbox"/>	xxxxxxxx850867	Testing Gtc Ccsa	-- Open	20099 03299 03399 03499 00000 00000 00000		Deactive
<input checked="" type="checkbox"/>	xxxxxxxx050043	L7 Name	-- Open	20099 03299 03399 03499 03699 03699 03799		Active

(1 - 4 of 4)

Step 14

Click the **continue** button.



Bulk Account Maintenance



Card Management - Account Management - Bulk Account Maintenance

demographics

Account Status:

Agency/Organization Name:

Statement Billing Address Line 1:

Statement Billing Address Line 2:

Statement Billing City: State: ZIP:

controls

Activate/Deactivate: activate now deactivate now

(MM/DD/YYYY) Active Start Date:

(MM/DD/YYYY) Active End Date:

(MM/DD/YYYY) Mission Critical Start Date:

(MM/DD/YYYY) Mission Critical End Date:

Credit Limit \$: set temporary limit

Cycle Limit \$: set temporary limit

Single Transaction Dollar Limit \$: set temporary limit

Number of Transactions per Cycle:

Number of Transactions per Day:

Cash Advance Limit \$: set temporary limit

MCC Group(s):

Step 15

The maintenance screen displays where you can select the function(s) you need to perform on the selected accounts.

In this example we will be deactivating accounts.



Bulk Account Maintenance



- [Inbox](#)
- [Card Management](#)
- [Hierarchy](#)
- [Reporting](#)
- [Inquiry](#)
- [Assistance](#)

Card Management - Account Management - Bulk Account Maintenance

demographics

Account Status:

Agency/Organization Name:

Statement Billing Address Line 1:

Statement Billing Address Line 2:

Statement Billing City: State: ZIP:

controls

Activate/Deactivate:

activate now deactivate now

(MM/DD/YYYY) Active Start Date:

(MM/DD/YYYY) Active End Date:

(MM/DD/YYYY) Mission Critical Start Date:

(MM/DD/YYYY) Mission Critical End Date:

Credit Limit \$:

Cycle Limit \$:

Single Transaction Dollar Limit \$:

Number of Transactions per Cycle:

Number of Transactions per Day:

Cash Advance Limit \$:

MCC Group(s):

Step 16

Click the **Activate/Deactivate** checkbox.



Bulk Account Maintenance



- Inbox
- Card Management
- Hierarchy
- Reporting
- Inquiry
- Assistance

Card Management - Account Management - Bulk Account Maintenance

demographics

Account Status:

Agency/Organization Name:

Statement Billing Address Line 1:

Statement Billing Address Line 2:

Statement Billing City: State: ZIP:

controls

Activate/Deactivate: activate now deactivate now

(MM/DD/YYYY) Active Start Date:

(MM/DD/YYYY) Active End Date:

(MM/DD/YYYY) Mission Critical Start Date:

(MM/DD/YYYY) Mission Critical End Date:

Credit Limit \$: set temporary limit

Cycle Limit \$: set temporary limit

Single Transaction Dollar Limit \$: set temporary limit

Number of Transactions per Cycle:

Number of Transactions per Day:

Cash Advance Limit \$: set temporary limit

MCC Group(s):

Step 17

Select the radio button for the **deactivate now** option.



Bulk Account Maintenance



- [Inbox](#)
- [Card Management](#)
- [Hierarchy](#)
- [Reporting](#)
- [Inquiry](#)
- [Assistance](#)

Card Management - Account Management - Bulk Account Maintenance

demographics

Account Status:

Agency/Organization Name:

Statement Billing Address Line 1:

Statement Billing Address Line 2:

Statement Billing City: State: ZIP:

controls

Activate/Deactivate: activate now deactivate now

(MM/DD/YYYY) Active Start Date:

(MM/DD/YYYY) Active End Date:

(MM/DD/YYYY) Mission Critical Start Date:

(MM/DD/YYYY) Mission Critical End Date:

Credit Limit \$:

Cycle Limit \$:

Single Transaction Dollar Limit \$:

Number of Transactions per Cycle:

Number of Transactions per Day:

Cash Advance Limit \$:

MCC Group(s):

Step 18

Scroll down to the bottom of the screen to submit the request.



Bulk Account Maintenance

demographics

Account Status:

Agency/Organization Name:

Statement Billing Address Line 1:

Statement Billing Address Line 2:

Statement Billing City: State: ZIP:

controls

Activate/Deactivate: activate now deactivate now

(MM/DD/YYYY) Active Start Date:

(MM/DD/YYYY) Active End Date:

(MM/DD/YYYY) Mission Critical Start Date:

(MM/DD/YYYY) Mission Critical End Date:

Credit Limit \$: set temporary limit

Cycle Limit \$: set temporary limit

Single Transaction Dollar Limit \$: set temporary limit

Number of Transactions per Cycle:

Number of Transactions per Day:

Cash Advance Limit \$: set temporary limit

MCC Group(s):

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Step 19

Click the **submit** button.



Bulk Account Maintenance

demographics

Account Status:

Agency/Organization Name:

Statement Billing Address Line 1:

Statement Billing Address Line 2:

Statement Billing City: State: ZIP:

controls

Activate/Deactivate: activate now deactivate now

(MM/DD/YYYY) Active Start Date:

(MM/DD/YYYY) Active End Date:

(MM/DD/YYYY) Mission Critical Start Date:

(MM/DD/YYYY) Mission Critical End Date:

Credit Limit \$:

Cycle Limit \$:

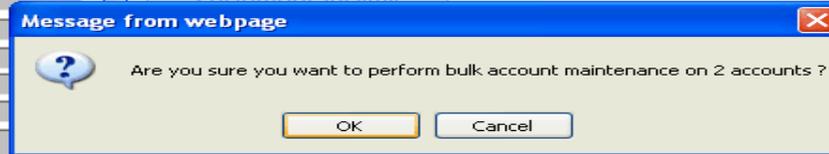
Single Transaction Dollar Limit \$:

Number of Transactions per Cycle:

Number of Transactions per Day:

Cash Advance Limit \$:

MCC Group(s):



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Done

Internet

100%

Step 20

A system message displays asking you to confirm the request.



Bulk Account Maintenance

demographics

Account Status:

Agency/Organization Name:

Statement Billing Address Line 1:

Statement Billing Address Line 2:

Statement Billing City: State: ZIP:

controls

Activate/Deactivate: activate now deactivate now

(MM/DD/YYYY) Active Start Date:

(MM/DD/YYYY) Active End Date:

(MM/DD/YYYY) Mission Critical Start Date:

(MM/DD/YYYY) Mission Critical End Date:

Credit Limit \$:

Cycle Limit \$:

Single Transaction Dollar Limit \$:

Number of Transactions per Cycle:

Number of Transactions per Day:

Cash Advance Limit \$:

MCC Group(s):

Message from webpage

Are you sure you want to perform bulk account maintenance on 2 accounts ?

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Done

Internet

100%

Step 21

Click the **OK** button.



Bulk Account Maintenance

The screenshot shows the Citi Manager interface. At the top, there is a navigation bar with the Citi logo and several menu items: [Inbox](#), [Card Management](#), [Hierarchy](#), [Reporting](#), [Inquiry](#), and [Assistance](#). Below this, the breadcrumb path is [Card Management - Account Management - Bulk Account Maintenance](#). The main content area displays a confirmation message: "Bulk account maintenance completed successfully for 2 accounts." Below the message is an [ok](#) button. At the bottom of the page, there is a footer with the text "> Citi Manager", "citigroup.com", "Last Updated 06/28/2010", "Home", "Terms of Use", "Privacy", and "Copyright© 1999 - 2010 Citigroup Inc.". The browser's address bar shows "Internet" and the page is zoomed to 100%.

Step 22

The confirmation screen displays acknowledging the bulk account maintenance performed was completed successfully.

Bulk Account Maintenance



[Inbox](#) [Card Management](#) [Hierarchy](#) [Reporting](#) [Inquiry](#) [Assistance](#)

Card Management - Account Management - Bulk Account Maintenance

Bulk account maintenance completed successfully for 2 accounts.

ok

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Done

Internet

100%

Step 23

Click the **ok** button.



Bulk Account Maintenance



- Inbox
- Card Management
- Hierarchy
- Reporting
- Inquiry
- Assistance

Card Management - Account Management - Bulk Account Maintenance

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The following accounts will not be considered for bulk account maintenance:

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Numeric Sort Alpha Sort

(+) – Indicates that some of the subunits of collapsed unit have been changed.

select	business unit	accounts		
		in unit	in unit & subunits	selected
<input type="checkbox"/>	20099 - AGENCY 99 IBT	0	97	0

Total number of accounts selected: 0

exclude accounts

continue

Step 24

Congratulations!

You have just completed the lesson on using Bulk Account Maintenance.

End of Procedure.

