

# GROUP MANAGER TUTORIALS

## As a group manager you will be able to:

- View your cardholders transactions
- View declined transactions
- View your cardholder's statements

**usbank.** Welcome to Access Online!

Please enter the information below and login to begin.

Organization Short Name:

User ID:

Password:

[Login](#)

[Forgot your password?](#)

[Register Online](#)

[Website/Browser Requirements](#)

Sign in to Access Online using your Group Manager User Name and Password

Your Group Manager User Name and Password will be different than your Cardholder User Name and Password

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⇒ **View your cardholder's transactions.**

- Transaction Management
- Transaction List
- Enter Cardholder Name

**usbank** Message(s) from Access Online Language Selection:  
American English ▾

**Transaction Management**

Welcome to Access Online! Stretch your program limits and streamline payment processes with Access Online, our innovative program management and reporting tool. This web-enabled tool offers a feature-rich platform that can be easily configured and deployed to meet your unique needs. Access your payment solutions anytime, anywhere with Access Online.

Bienvenue sur Access Online! Repoussez les limites de votre programme et simplifiez les processus de paiement avec Access Online, notre outil novateur d'établissement de rapports et de gestion de programme. Cet outil Internet offre une plate-forme riche en fonctionnalités qui peut être aisément configurée et déployée pour répondre à vos besoins particuliers. Accédez à vos solutions de paiement en tout temps, où que vous soyez, avec Access Online.

**To View one of your cardholders transactions**

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**usbank** Transaction Management

**Transaction List**

View, review, allocate/reallocate and add comments to transaction information.

[View Previous Cycle](#)  
Presents the Transaction list for the previous cycle.

[View Pending Transactions](#)  
Presents the pending transactions list.

**Click on Transaction List**

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Select	Status	Trans Date	Posting Date	Merchant	City/State	Amount	Detail	Purchase ID
<input type="checkbox"/>		07/30	08/02	DUGMORE DUNCAN INC	781-7401101, MA	\$330.93	Ⓜ	VREE5D61514B
<input type="checkbox"/>		07/28	07/28	AMAZON.COM	AMZN.COM/BILL, WA	\$396.75	Ⓜ	002-4617825-67506
<input type="checkbox"/>		07/26	07/27	AMAZON.COM	AMZN.COM/BILL, WA	\$30.00	Ⓜ	002-4617825-67506

⇒ You will also be able select from the drop down box ALL transactions and CURRENT transactions

⇒ You will need to click on Switch Accounts to view other cardholder's transactions within your group.



## Transaction Management Card Account Summary with Transaction List

- Account Administration
- Transaction Management
  - Transaction List
- Account Information
- Reporting
- Data Exchange
- My Personal Information

Card Account Number: \*\*\*\*\*2163 [Switch Accounts](#)

To view another Cardholder Click on Switch Accounts

### [-] Card Account Summary

Account Number: ●...6163  
 Account Name:  
 Billing Cycle Close Date:

● Open Account

### [+] Search Criteria [Return to top](#)

### [-] Transaction List [Return to top](#)

Records 1 - 3 of 3

[Check All Shown](#) | [Uncheck All Shown](#)

Select	Status	Trans Date	Posting Date	Merchant	City/State	Amount	Detail	E+	Purchase ID	A
<input type="checkbox"/>		07/30	08/02	DUGMORE DUNCAN INC	781-7401101, MA	\$330.93	Ⓢ		VREESD61514B	
<input type="checkbox"/>		07/28	07/28	AMAZON.COM	AMZN.COM/BILL, WA	\$396.75	Ⓢ		002-4617825-67506	
<input type="checkbox"/>		07/26	07/27	AMAZON.COM	AMZN.COM/BILL, WA	\$30.00	Ⓢ		002-4617825-67506	

Ⓢ Disputed Ⓜ Reallocated Ⓢ Ⓢ Trans Detail Level

[Check All Shown](#) | [Uncheck All Shown](#)

## View declined transactions

- Go to your home page
- Account Information
- Cardholder Account Profile
- Enter Cardholder Name
- Account Authorizations
- 



## Message(s) from Access Online

Language Selection:

- Account Administration
- Transaction Management
- Account Information
- Reporting
- Data Exchange
- My Personal Information

Welcome to Access Online! Stretch your program limits and streamline payment processes with Access Online, our innovative program management and reporting tool. This web-enabled tool offers a feature-rich platform that can be easily configured and deployed to meet your unique needs. Access your payment solutions anytime, anywhere with Access Online.

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This is your home page

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## Message(s) from Access Online

Language Selection:

American English

- Account Administration
- Transaction Management
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Click on Account Information

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## Account Information

- Account Administration
- Transaction Management
- Account Information
  - Statement
  - Account Profile
- Reporting
- Data Exchange
- My Personal Information

### Statement

View account statement(s).

- Cardholder Account Statement
- Managing Account Statement
- Diversion Account Statement

### Account Profile

View account demographics, limits, accounting code, and other related information.

- Cardholder Account Profile
- Managing Account Profile
- Diversion Account Profile

Click on Cardholder Account Profile

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## Cardholder Account Profile

### Search & Select an Account

[View Diversion Account](#) | [View Managing Account](#)

### Cardholder Account Search

Search for an account by Cardholder Account Number, Name, or Social Security Number. You can also find a cardholder account by first [Searching for a Managing Account](#).

Account Number:

Last Name:

First Name:

OR

Social Security Number:

OR

Search

Enter in the Cardholder's Name

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## Cardholder Account Profile Account Summary

- Account Administration
- Transaction Management
- Account Information
  - Statement
  - Account Profile
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- Data Exchange
- My Personal Information

Card Account Number: \*\*\*\*\*@163 [Switch Accounts](#)

Select an item below to view its contents. You can also [View a Managing Account](#)

### [Demographic Information](#)

View account name, address, and contact information.

### [Authorization Limits](#)

View authorization limit information such as Credit Limit, Single Purchase Limit, and Available Credit.

### [Account Information](#)

View other account information such as Account Status, Hierarchy Position, Cycle Day, and Open Date.

### [Account Authorizations](#)

View Account Authorization information such as Request Type, Request Source, MCC, and Transaction Amount.

### [Default Accounting Code](#)

View the default accounting code assigned to the account.

### [Financial History](#)

View the account 12-month history, 7-year history analysis, and 7-year history.

### Account History

Request Type	Update Method	Last Updated
Setup	Online	07/16/2010 08:56:05
Maintenance	Online	07/22/2010 12:46:55

Click on Account Authorizations

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## Cardholder Account Profile Account Authorizations

- Account Administration
- Transaction Management
- Account Information
  - Statement
  - Account Profile
- Reporting
- Data Exchange
- My Personal Information

Card Account Number: \*\*\*\*\*@163 [Switch Accounts](#)

Name:

Records 1 - 1 of 1

Auth Date	Auth Time	Response	Auth Number	Type of Request	Transaction Amount	MCC	MCC Description
08/09/2010	01:58 PM ET	Approved	true	Mail/Phn Ord	\$304.63	5046	WHOLESALE COMMERCIAL

Records 1 - 1 of 1

[<< Back to Cardholder Account Summary](#)

To see more information about the transaction Click on the Auth Time

Under the Response heading you will be able to see if the transactions was approved or declined

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