Access Online Quick Reference Guide

I. To log in to Access Online go to access.usbank.com. Logging in to Access Online is not required but can help cardholders monitor their account and will give them access to their statements.
   A. The initial log in information comes from the Purchasing Card Team.
   B. If you need to reset your password and forgot the answers to your security questions, click the Contact Us link on the right half of the page.
II. Welcome Screen/Home Page shows an overview of your account
   A. You can add quick links to your home page by clicking the Manage Home Page Settings link on the right of the screen.
   B. You can get back to the home screen at any time by clicking on Home on the left half of the screen.
III. Transaction Management shows the transactions of the last 12 cycles/months
   A. Select Transaction Management on the left side of your screen. Then click Transaction List.
   B. You can change the “Billing Cycle Close Date” with the drop down box to view previous months’ transactions or leave it on “Open” to view the current open cycle’s transactions. Then click Search. Your transactions for the chosen cycle will be listed.
   C. Clicking on any of the blue colored Header Names will sort your transactions by that column. Click that column header again to change between ascending and descending order.
   D. Clicking on the Transaction date will give you a summary of that transaction. This is also where you can go to Dispute a transaction that has occurred in the last 60 days. You can always call U.S. Bank to Dispute a transaction; it does not have to be done in Access Online.
   E. If the Merchant’s name is in blue, you can click on the name for more information about that vendor.
IV. Selecting Account Information on the left side of your screen allows you to view your Statements and Account Profile
   A. To view your statements, click on Cardholder Account Statement then select the cycle close date of the statement that you want to view.
   B. To view your account profile information, click Cardholder Account Profile. Then click View Account Profile. Click the plus or minus sign next to each section to expand or contract the information.
V. Select Reporting to run reports on your transactions.
   A. Click on Financial Management and then select the type of report that you want to run.
   B. After selecting the report that you want, complete the selection parameters for the information that you want. After all your parameters are set, click Run Report.
VI. My Personal Information on the left half of the screen allows you to change and update your profile.
   A. Click Email Notifications to choose what notifications you want to receive via email, such as Dispute Status notifications, password expiration notifications, and statement notifications.
   B. Account Alerts is where you can choose to enroll in Fraud Alerts for your purchasing card.
VII. Last 3 links on left half of screen.
   A. Home: takes you back to your welcome screen and home page.
   B. Contact Us: has U.S. Bank contact information for account inquiries and password resets.
   C. Training: takes you to U.S. Bank’s Access Online web-based training. The trainings could be helpful if you want more in depth information about anything in Access Online including creating and running reports.