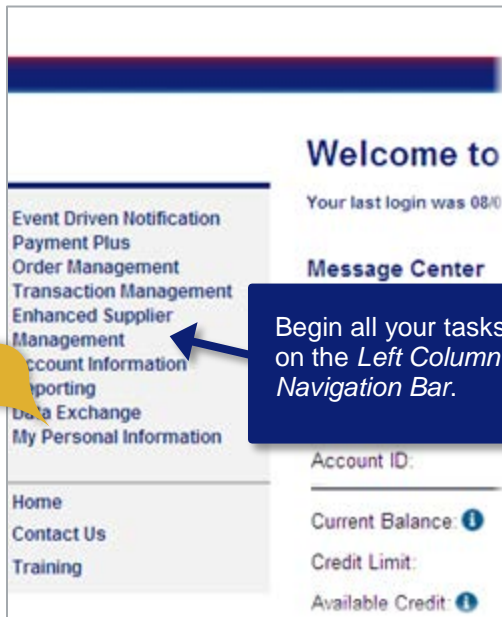


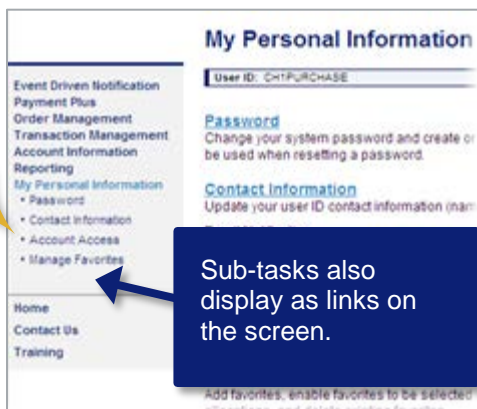
# Navigation Basics

You can use this quick reference guide as a fast reminder of basic navigation in Access® Online.

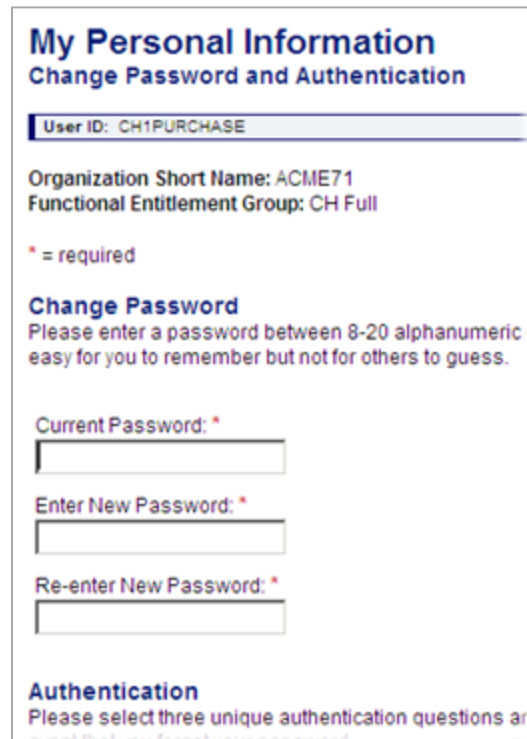
Navigation in Access Online is quick and easy. You always begin a process by selecting a high-level task on the *Left Column Navigation Bar*.



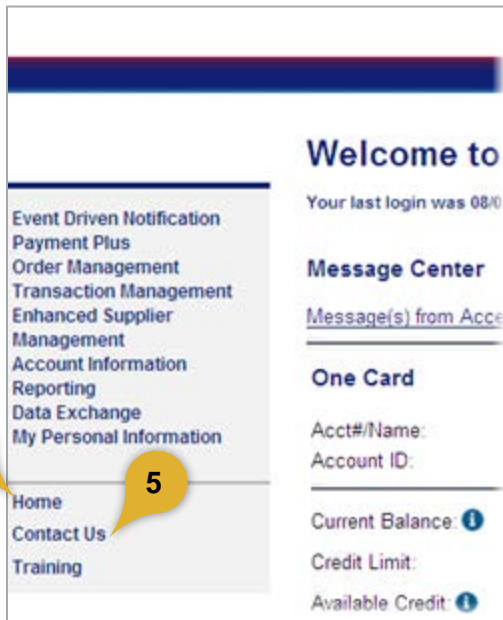
1. Select a task (e.g., **My Personal Information**). Related sub-tasks display below.



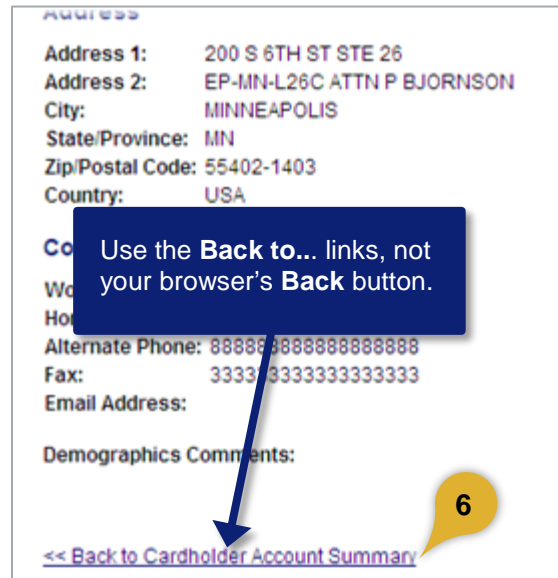
2. Click a sub-task or a screen link to continue (e.g., **Password**).



3. The system displays the appropriate screen.



4. Click the **Home** link from any screen to return to the *Client Home* page.
5. Click the **Contact Us** link for a list of phone numbers and other information to use if you need help.



6. When you are in the middle of a procedure, use the **Back to...** links on the screen to go back a screen. Do not use the **Back** button on your browser.



7. For security reasons, be sure to log out after each session by clicking the **Log Out** link.

# Navigation Summary

The screenshot shows the 'Transaction Management' interface for 'ACME74 Corporation'. The left sidebar contains navigation links: Home, Contact Us, Training, My Personal Information, Reporting, Account Information, Transaction Management (with sub-links for Card Account List and Transaction List), Order Management, Payment Plus, and Event Driven Notification. The main content area displays a 'Card Account Summary' for 'CHASTIN J DORDING' with a balance of \$5,385.65. Below this is a table of transactions with columns for Select, Status, Approval Status, Match, Date, Posting Date, Merchant, City/State, Amount, Detail, Purchase ID, Attachment, Comments, and Accounting Code. Callout boxes provide instructions: 'Note your organization's name.' points to the top right; 'Be sure to log out after each session.' points to the 'Logout' link; 'Begin all procedures by selecting a high-level task at left. Related subtasks display.' points to the sidebar; and 'Use the Home link return to the Client Home page from any screen. Use the Contact Us link if you need help.' points to the 'Home' link in the sidebar.

## Common Cardholder Tasks Table

To perform this action:	Select this high-level task...	And then this sub-task or...	...Screen link
Access a list of my transactions	Transaction Management	Transaction List	Transaction List
Perform transaction management tasks (e.g., dispute, comment, approve)	Transaction Management	Transaction List	Transaction List
View my statement	Account Information	Statement	Cardholder Statement
View my account profile (e.g., demographic information, authorization limits)	Account Information	Account Profile	Cardholder Profile
Run a report (e.g., Transaction Detail)	Reporting	NA	Report Name Link
Change my password	My Personal Information	Password	Password
Change my authentication questions and/or responses	My Personal Information	Password	Password
Change my contact information	My Personal Information	Contact Information	Contact Information
Enable/disable email notification of statement availability	My Personal Information	NA	Email Notification
View my account access information (e.g., functional entitlement group, available accounts)	My Personal Information	Account Access	Account Access
Add an account	My Personal Information	Account Access>Add Accounts	Add Accounts
Find out who to call for help	Contact Us	NA	NA
Return to the Client Home page	Home	NA	NA
Log out of Access Online	Log Out link in upper right corner	NA	NA

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## **Survey**

Please take a few minutes to respond to a short [survey](#) on our training.