



Access[®] Online

Mobile app

*User guide
Version 1-3
All users*

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[REDACTED]	[REDACTED]
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[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]

Mobile app

You can use the Access Online mobile app to view account and card information, manage transactions (including disputing and attaching receipts), make payments, request a virtual account, and set up alerts.

You can use both the Access Online web site and the mobile app. The tasks you complete in the mobile app synch immediately with Access Online.

The app does not store any sensitive account information on your mobile device, and the app uses the highest level of secure encryption to protect all your transmissions.

Download and start using the app

1. Download the app to your supported Apple or Android mobile device and use your existing Access Online credentials to log in.

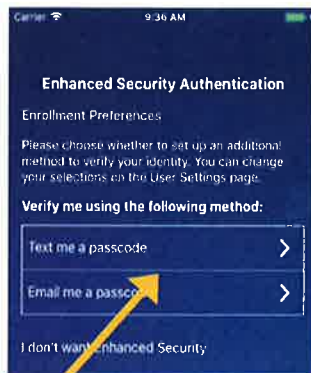
2. Or, to register, have your organization short name (OSN), account number, and account expiration date available and tap **Register Online**.

3. The options you see in your app depend on your organization's setup. You may not see all functions available in this document.

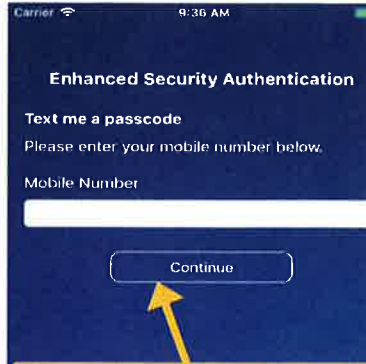
4. Tap **Help** for in-app assistance. Click **Logout** to log out of the app.

The image shows four sequential screens of the Access Online mobile app. The first screen is the login page with fields for Organization Short Name (admin), User ID, Password, and a Login button. The second screen is the 'Continue' screen with a 'Continue' button and a note about the app's purpose for Corporate Travel, Purchasing or One Card cardmembers. The third screen is the main menu with options like My Accounts, View Account Summary, View Transactions, View Card Information, Contact Information, Settings, Message Alert Preferences, User Settings, Help, and Logout. The fourth screen is the Help screen.

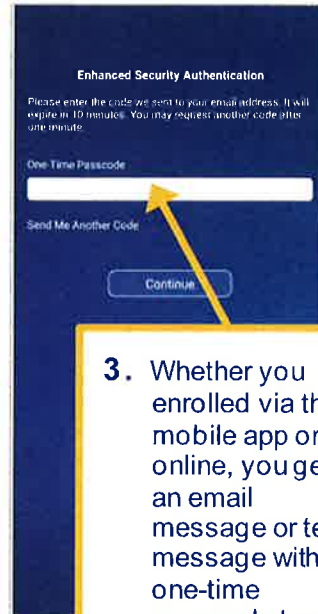
Use enhanced security



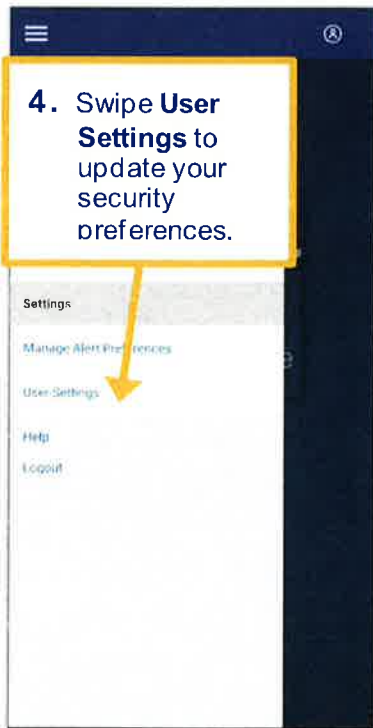
1. If you have not enrolled in enhanced security on the Access Online web site, you can enroll on the mobile app. Simply pick your option. Your organization may require you to enroll.



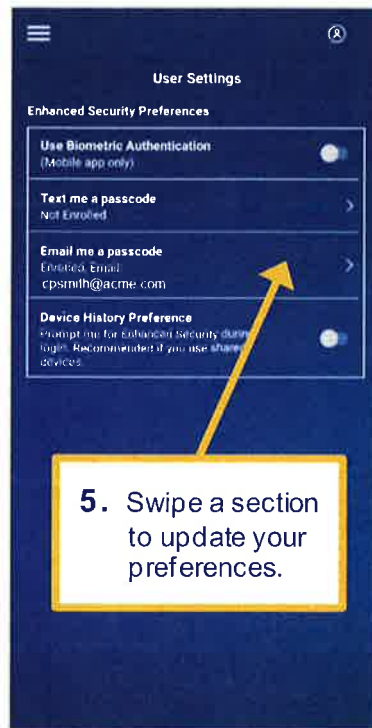
2. Specify your mobile telephone number or your email address and tap **Continue**. Review the terms and conditions and finish the enrollment.



3. Whether you enrolled via the mobile app or online, you get an email message or text message with a one-time passcode to use each time you log in.



4. Swipe **User Settings** to update your security preferences.



5. Swipe a section to update your preferences.

View account summary

The first screenshot shows the 'My Accounts' menu with 'View Account Summary' highlighted. The second screenshot shows a list of three sample accounts. The third screenshot shows the detailed summary for 'SAMPLE ACCOUNT 1 - 1234'.

Summary	
Select an Account	
SAMPLE ACCOUNT 1 - 1234	Declining Balance - Open
SAMPLE ACCOUNT 2 - 2234	Declining Balance - Open
SAMPLE ACCOUNT 3 - 3234	Declining Balance - Open

SAMPLE ACCOUNT 1 - 1234	
Declining Balance	
As of 02/12/2020	
User	Carlos Smith
Account Status	Open
Available Credit	\$1.00
Credit Limit	\$1.00
Balance	\$0.00

1. Tap **View Account Summary**.
2. Review the list of accounts.
3. Review the summary information.

View card information

The first screenshot shows the 'My Accounts' menu with 'View Card Information' highlighted. The second screenshot shows a passcode entry screen. The third screenshot shows the card information for 'SAMPLE ACCOUNT 1 - 1234'.

SAMPLE ACCOUNT 1 - 1234	
Corporate Card	
Account	4321 1234 1234 1234
Security Code	000
Expiration	11/23

1. Tap **View Card Information**.
2. Specify your passcode.
3. View information.

Add an account to your mobile wallet

1. Tap the option to add the account to your mobile wallet (e.g., Google Pay, Apple Wallet).

2. Follow the instructions for your mobile wallet.

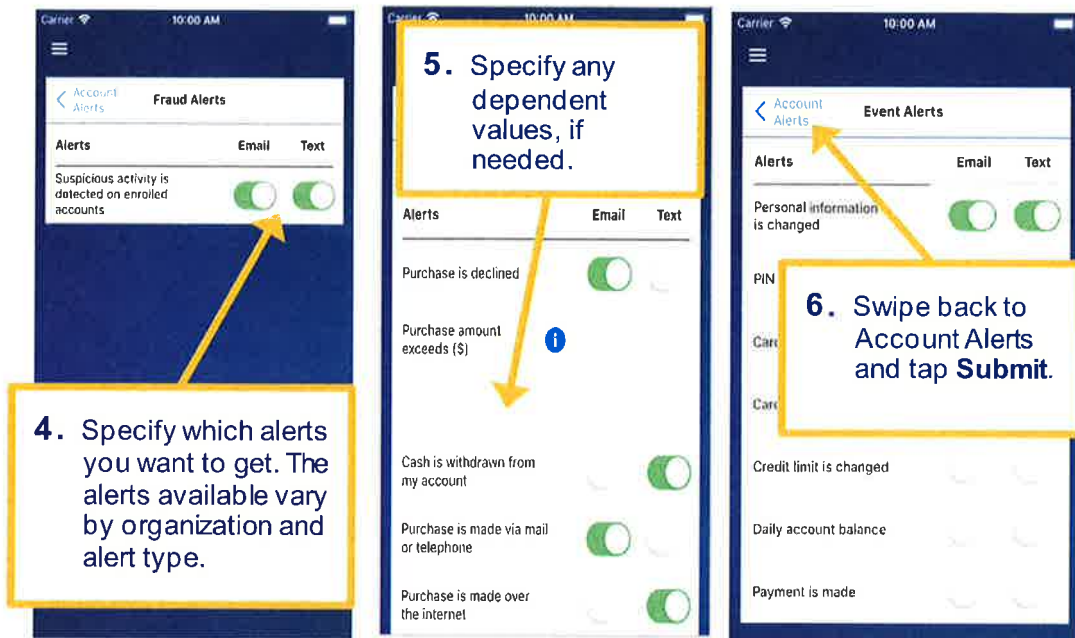
Create alerts

1. Tap Manage Alert Preferences.

2. Specify your email, mobile phone number, language, and timeframe.

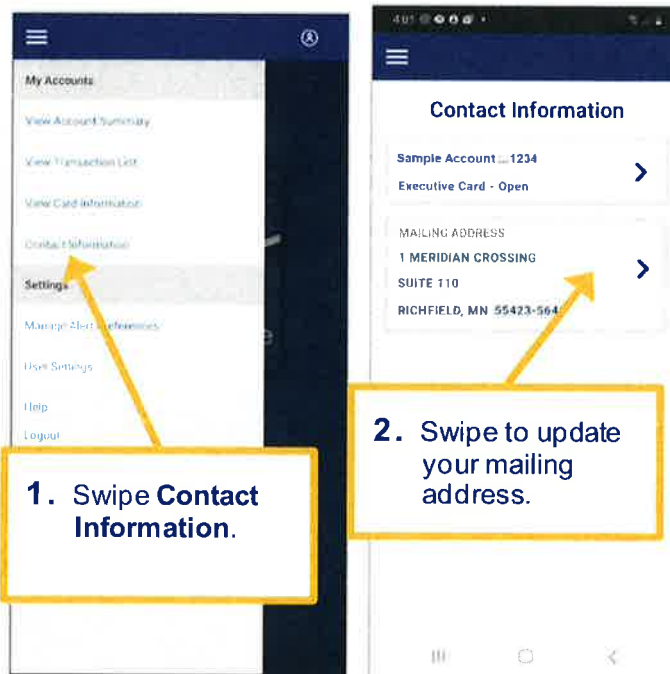
3. Swipe the alert type.

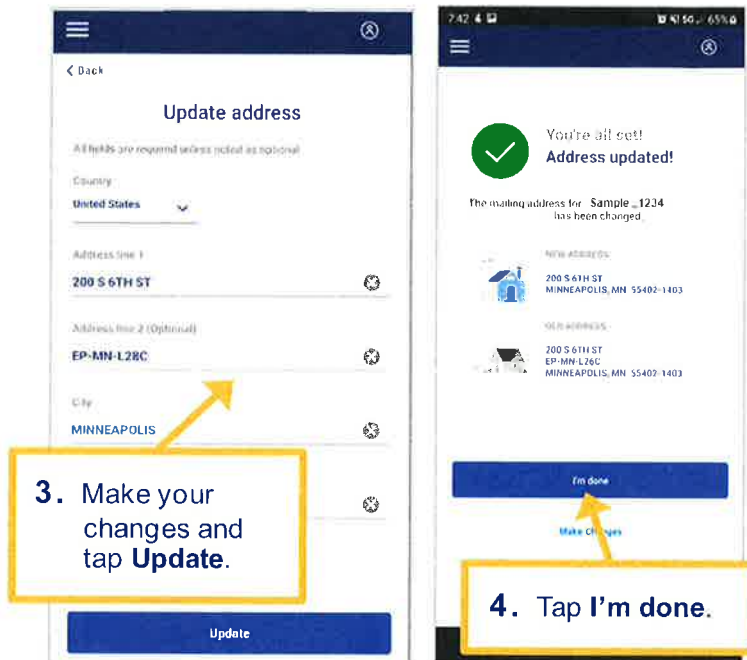
Note the options for purchase alerts



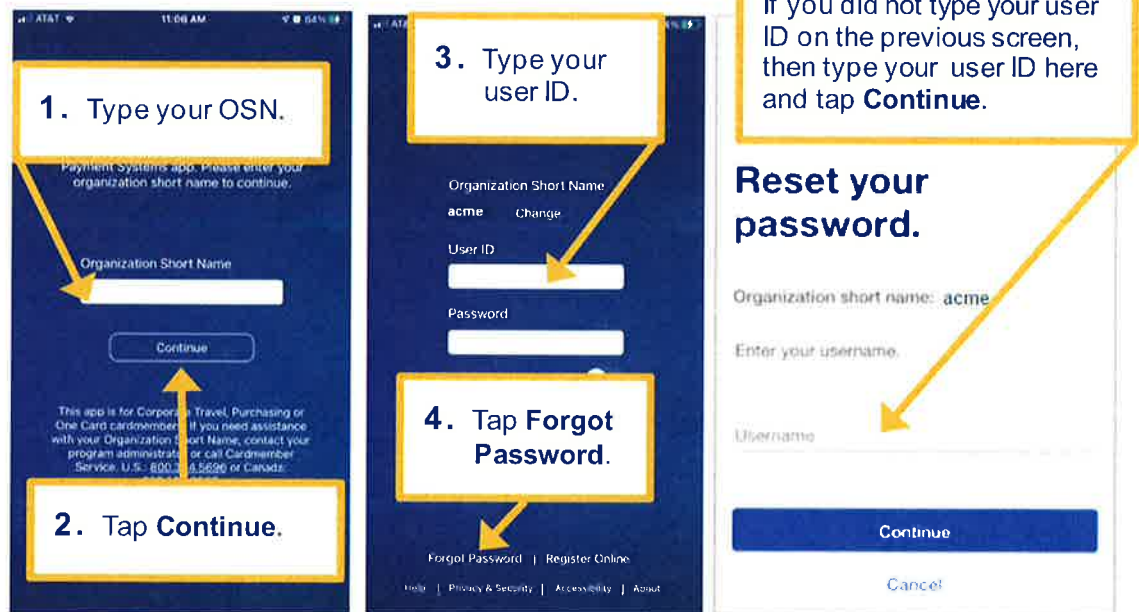
Learn More: For more information on alerts, refer to the *Access Online: Alerts and notifications* user guide.

Update your contact information





Reset your password



5. Type the answer to your security question.

6. Tap **Continue**.

7. Wait for an email with a password reset code and then enter the code.

8. Tap **Continue**.

The first screenshot shows a security question screen with the text "We need to make sure you're you" and "We need you to answer your security question to verify your identity". The question is "What is your security ID?" and the answer "Paris" is entered. A "Continue" button is at the bottom.

The second screenshot shows a screen titled "Enter the code we sent here." with the text "We sent a password reset code to ca***ez@acme.com. Your code will expire in 15 minutes." and a "Password reset code" input field. A "Request new code" button and a "Continue" button are also present.

The third screenshot is an email notification from "Access Online" with the subject "Access Online" and the text "Your password authentication code is ready." It displays the "Authentication Code: 1abCDEfg" and includes instructions on code validity and a "Continue" button.

9. Type a new password or password phrase two times. The requirements update as you type.

10. Tap **Update password**.

Password phrases are less restrictive, but you cannot start or end with a space nor user two consecutive spaces.

11. Use your user ID and new password to log in.

The first screenshot is titled "Create a new password." and lists requirements: "At least 12 characters", "At least one uppercase letter", "At least one lowercase letter", "At least one number", and "At least one special character". It shows a password field with a "Show" button and a "Confirm new password" field. A "Update password" button is at the bottom.

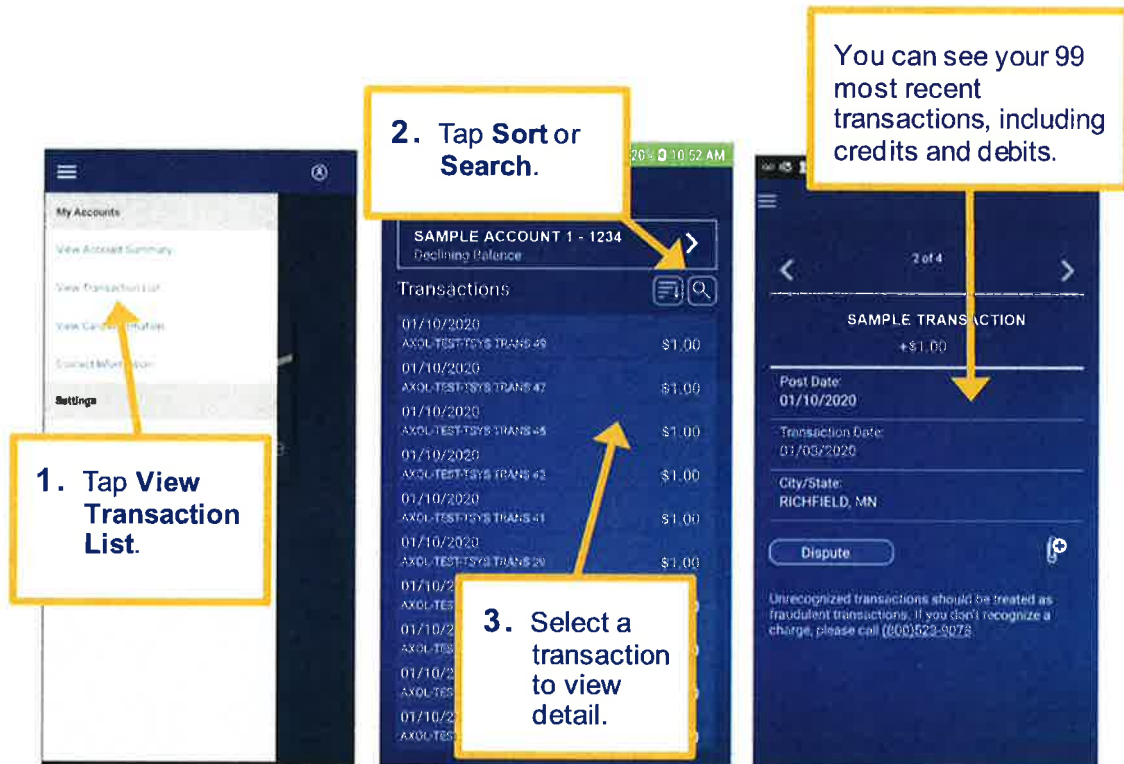
The second screenshot is titled "Create a new password." and says "Your password should be something you can remember, but not easy to guess. Your password should contain: At least 14 characters." It features a "Password" field, a "Re-enter password" field, and "Update password" and "Cancel" buttons.

The third screenshot is the login screen titled "Access Online" with a success message "You successfully updated your password." It includes fields for "Organization Short Name" (acme), "User ID", and "Password", along with a "Remember Me" checkbox and a "Login" button. Links for "Forgot Password" and "Register Online" are at the bottom.

Transaction management

You can view transactions, dispute transactions, attach a receipt to a transaction, and create a payment request.

View transactions



Dispute a transaction

1. Search for the transaction you need dispute and tap **Dispute**.

2. Select the reason.

3. Specify your name, mobile number, and add comments.

4. Tap **Submit**.

Tip! After you submit the dispute, you can cancel the dispute if you need to. You can also track the dispute status.

Attach a receipt to a transaction

1. Find the transaction you want to attach a receipt to and tap the **Paperclip**.

2. Upload an existing document or take a photo of a receipt.

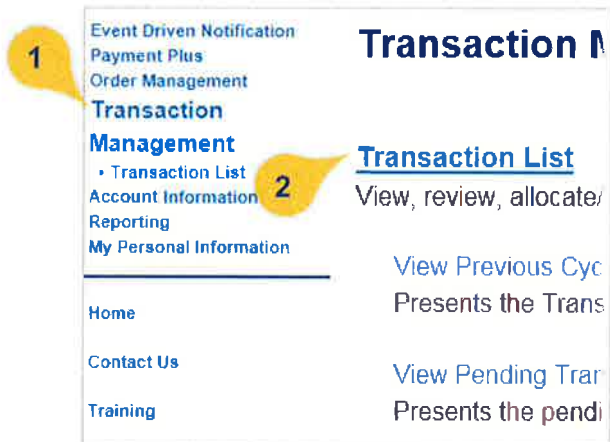
3. Tap the **Plus Sign** to add another attachment.

Tip! You can upload a JPG, PNG, or PDF. You can upload unlimited receipts, but the maximum file limit is 5 MB for all files. Access Online converts all uploads to a single PDF for a transaction. After you upload an attachment, a *Paperclip* icon displays for the transaction. Click the **Paperclip** icon to view the attachment.

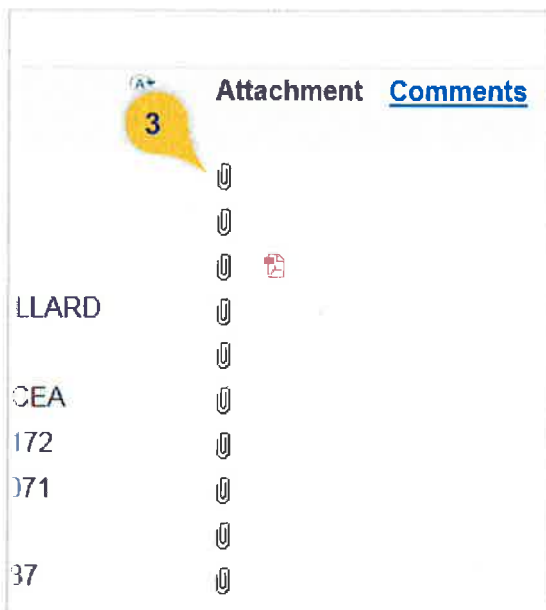
Attachments

You can use this quick reference guide as a fast reminder of the basic steps for attaching a file (PNG, JPG, or PDF) to a transaction and viewing attached files.

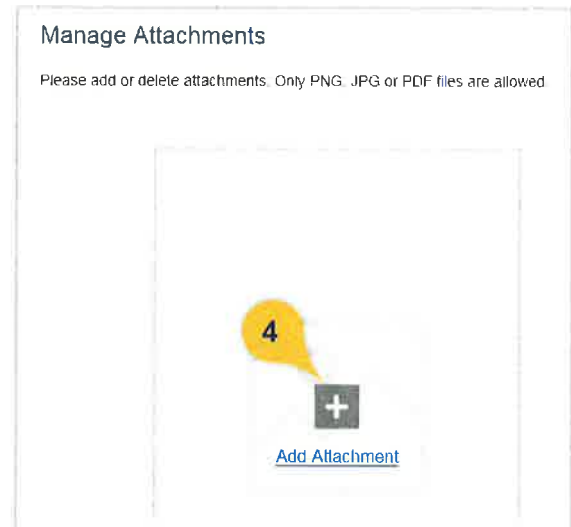
Attach a file



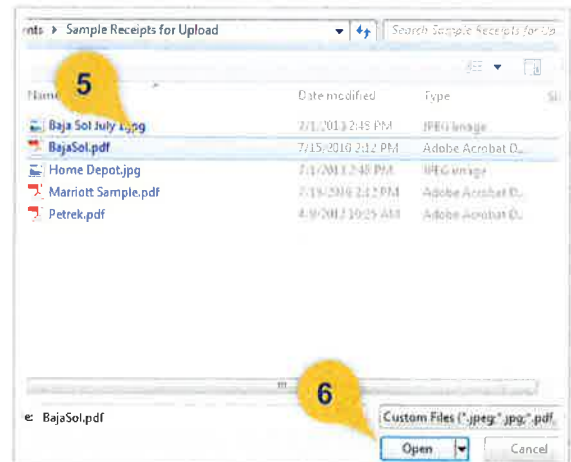
1. Select the **Transaction Management** high-level task.
2. Click the **Transaction List** link.



3. On the list of transactions, click the **Paperclip** icon.



4. Click the **Add Attachment** link.



5. Search and select one or more files to attach.
6. Click the **Open** button.

Transaction Summary report

Management Account Information Reporting

- Program Management
- **Financial Management**
- Supplier Management
- Tax and Compliance Management
- Administration
- User Activity Audit Reporting

1. Select **Reporting**.
2. Select **Financial Management**.

detail, allocation (accounting code) information and transaction log data.

[Multiple Attachments Request](#)
Create a request to receive files attached to transactions during a specific date range.

[Transaction Summary](#)
Transaction summary information.

3. Click **Transaction Summary**.

Report Output

Output Type: PDF

4. Select **PDF** if you want to view the attachment.

Page Break:
 Yes No

Note: Page Break is applicable

Run Report **Reset**

5. Click **Run Report**.

Transaction Status	Attachment
Not Reviewed	
Not Reviewed	View Image

(button to return to this report)

6. Click **View Image**.

Report Output

Output Type:

Excel

7. Select **Excel** if you just want to check for receipt attachment.

M	N
Attached Document File Name	File Name
700026_017732437026_09012021_1	700026_017732437026
700026_017732437026_09012021_2	700026_017732437026
700026_017732437026_09012021_1	700026_017732437026
700026_017732437026_09012021_2	700026_017732437026

8. Note the attachment file name in the report.

Multiple attachments request

detail, allocation (accounting code) information and transaction log data.

[Multiple Attachments Request](#)

Create a request to receive files attached to transactions during a specific date range.

[Transaction Summary](#)

Transaction summary information.

1. If you are a Program Administrator, then you can also request a file of multiple attachments.
2. Select **Reporting**.
3. Select **Financial Management**.
4. Click **Multiple Attachments Request**.

Multiple Attachments Request

Create a New Request

Create a request to receive files attached to transactions

All fields required unless noted as *(optional)*.

Step 1 - Select a Date Type and Date Range

Date Type

- Cycle Close Date
- Enable Cycle Day
- Calendar Month
- Posting Date
- Transaction Date

Date Range

5. Complete the form.

Submit

6. Click **Submit**.

Learn more: For more detailed information, refer to the *Access Online: Multiple attachments request quick start guide*.

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Survey

Please take a few minutes to respond to a short survey on our training.