To View Statements

- Scroll to the bottom of the list and select the account that is named the same as your company. This is the central bill account. Click on "Submit". You can also utilize the account search features at the bottom of the page.
- The most recent statement information will be displayed.

For Previous Statements

- Click on the drop down menu in the top left side of the screen labeled "View Statement". A drop down menu will appear and you will be able to select the previous statement periods. Online statement will archive the past 12 months.

To Add New Users/Edit User

To Add New Users

- Click "Administration".
- Then "Add a New User".
- Fill in the appropriate blanks. Make sure that the Access Level Drop Down Box is set to the appropriate access for that user. Then click on "Add User".

The screen will refresh indicating that the new user was successfully added.
*If you have opted to add a user with Multiple Accounts Access, click on the tab at the bottom of the screen that says "Add or Delete Accounts". Highlight one of the accounts in the left box that needs to be added to the user's profile and then click on "Add". Continue to do this until all of the accounts for that user are in the box on the right.

Once you are finished, click "Done".
If accounts need to be deleted for the specified user, simply click on the accounts in the right box and click on "Delete". Those accounts will no longer appear in the Account Selection box for the user.

To Edit User or Update Password

- Click "Administration".
  A page will be displayed showing all of the current users. Select the User ID on the left that needs to be updated.
  Use the Password and Confirm Password fields to type in a temporary password and/or enter the new information then click "Update". The password will be automatically reset and the new changes will go into effect.

To Print/Export Statements

To Print

- Click the print icon on your toolbar.

To Export

- Click "Print Preview".

A print preview window will open showing the current statement. Click on the envelope button at the top left of the page.
An Export Option box will appear giving you the ability to export the statement into any of the following formats:

- Acrobat (PDF)
- Microsoft Word
- Microsoft Excel
- Rich Text Format

To View Current Transactions

- Click "Transactions".
- Key in the account number and select "All Transactions". Click "Submit".

A list of your 50 most recent transactions will be displayed along with your current credit limit.

To Update Your Profile

- Click "My Profile".

Click on any of the following links to make changes:

- Change Password
- Change Email Address
- Change Password Questionnaire
- Change User ID

- "Update" to submit

To Return to Account Selection

- Click "Select Account".

Choose another account to view and click "Submit".

To Make a Manual Payment

This action requires the use of a GoID token. There is a 10 business day prenote period prior to posting the first payment.

- Click "Payment".
- Key token information to authenticate.
- Enter Routing Number and Account Information
- Enter Amount (use $1 for prenote)
- Submit the payment.

Double postings may occur if you are set up for direct debit.

To Exit

Click "Exit" to log off the system. Failure to log off without using "Exit" may lock you out of the system for 15-30 minutes.

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