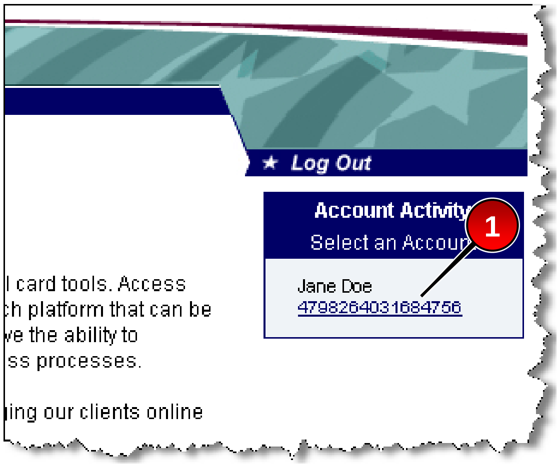
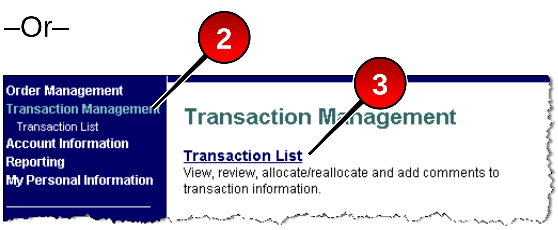
View Transactions

You can use this quick reference guide as a fast reminder of the basic steps for viewing transactions.

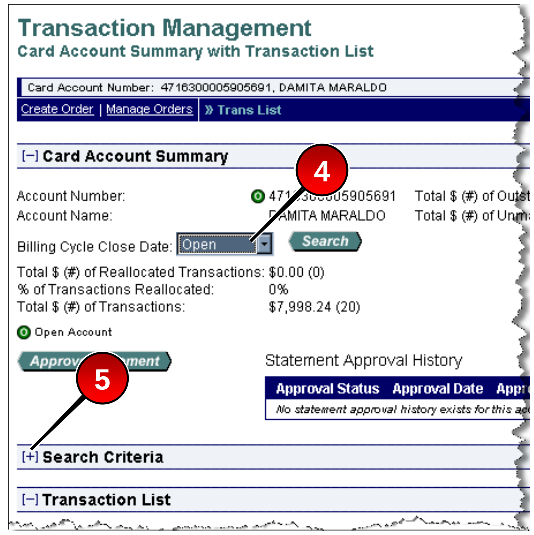


1. Click the account number link, if available via the *Account Activity* box on the *Client Home* page.

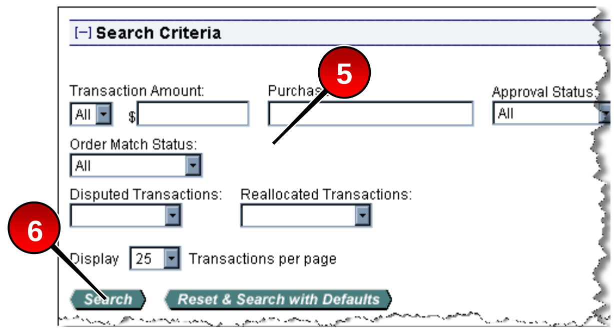
–Or–



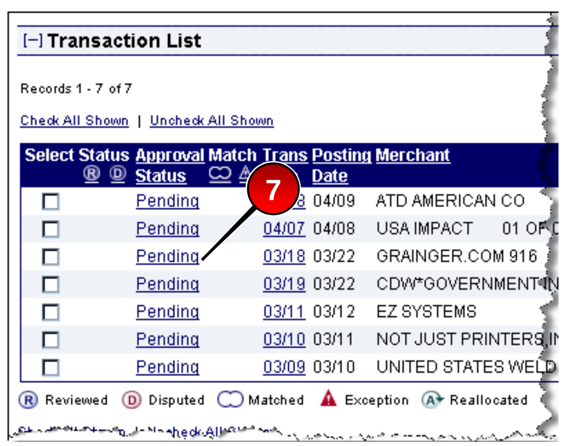
2. Select the **Transaction Management** high-level task.
3. Click the **Transaction List** link.



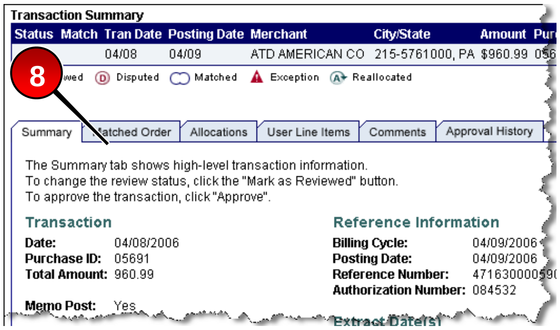
4. Select a different cycle, if desired.



5. Open the *Search Criteria* area and then specify search criteria.
6. Click **Search**.



7. On the list of transactions, click any linked item to access the detail tabs.



8. Select any tab to view additional detail.

➢*Learn More:* For more detailed information, including detailed information about each tab, refer to the *Transaction Management* web-based training lesson and user guide available at:

https://wbt.access.usbank.com

Contact your Program Administrator for the most current passwords.