

How to download a file for Quicken, QuickBooks, or Excel within Online Banking

Login to Online Banking, select the share to download the share history for.

COMMUNITY FIRST
Credit Union

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FINANCIAL TOOLS

Net Worth | Budget | Spending | Trends | Debts

ACCOUNTS

SHARE -500

Available Balance \$94.99

Current Balance \$100.00

To choose the date range to download, select “Filters”.

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Credit Union

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SHARE -500

Last Updated: May 7, 2020 10:42 AM

Transactions | Details

Filters

Search transactions

Date Description Amount

MAY 1 2020 Deposit Income + \$100.00 \$100.00

For the "Time Period", select "Custom Date". Then, enter the date range to download and "Apply Filters".

COMMUNITY FIRST Credit Union

Welcome back, MEMBER VALUED

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SHARE -S00

\$100.00 Current Balance | \$94.99 Available Balance

Last Updated: May 7, 2020 2:28 PM

Transactions Details

Time Period: Today, Yesterday, This month, **Custom Date** (red arrow)

Transaction Type: [Dropdown]

Description: [Text Box]

Starting Check #: [Text Box] to Ending Check #: [Text Box] Category: [Dropdown]

Reset Apply Filters

COMMUNITY FIRST Credit Union

Welcome back, MEMBER VALUED

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SHARE -S00

\$100.00 Current Balance | \$94.99 Available Balance

Last Updated: May 7, 2020 2:28 PM

Transactions Details

Start Date: **04/13/2020** (red arrow) to End Date: **05/07/2020** (red arrow)

Transaction Type: [Dropdown]

Description: [Text Box]

Min Amount: \$ 0.00 to Max Amount: \$ 0.00

Starting Check #: [Text Box] to Ending Check #: [Text Box] Category: [Dropdown]

Reset **Apply Filters** (red arrow)

Date: [Dropdown] Description: [Dropdown] Amount: [Dropdown]

MAY 1 2020	Deposit Income	+ \$100.00	\$100.00
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Once the selected date range displays, select the “download” icon and choose the file type.

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SHARE -S00

Last Updated: May 7, 2020 2:28 PM

Transactions Details

Current Balance \$100.00 Available Balance \$94.99

Export

Spreadsheet (xls)

Spreadsheet (csv)

Microsoft OFX (ofx)

Quicken (qfx)

Quickbooks (qbo)

Reset Apply Filters

Date Description Amount

At the bottom of the screen, expand and then “Open”. The PC will open the file with the applicable program if exists on the computer.

SHARE -S00

Last Updated: May 7, 2020 2:28 PM

Transactions Details

Time Period Tran

Min Amount Max Amount Start

AccountHistory (1).xls

Open

Always open files of this type

Show in folder

Cancel

MAY 1 2020 Deposit Income

APR 30 2020 Dividends Forfeited Uncategorized