

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.

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Credit Union

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ACCOUNTS

SHARE -500

Available Balance \$94.99

Current Balance \$100.00

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

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SHARE -500

Last Updated: May 7, 2020 10:42 AM

Transactions | Details

Filters

Search transactions

Current Balance \$100.00 | Available Balance \$94.99

Date	Description	Amount
MAY 1 2020	Deposit Income	+ \$100.00

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

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SHARE -S00

Last Updated: May 7, 2020 2:28 PM

Transactions Details

Time Period

Transaction Type

Description

Starting Check #

Ending Check #

Category

Today

Yesterday

This month

Custom Date

Reset

Apply Filters

\$100.00 Current Balance

\$94.99 Available Balance

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SHARE -S00

Last Updated: May 7, 2020 2:28 PM

Transactions Details

Start Date

End Date

Transaction Type

Description

Min Amount

Max Amount

Starting Check #

Ending Check #

Category

04/13/2020

05/07/2020

\$ 0.00

\$ 0.00

Reset

Apply Filters

Date

Description

Amount

MAY 1 2020

Deposit Income

+ \$100.00

\$100.00

\$100.00 Current Balance

\$94.99 Available Balance

Once the selected date range displays, select the “download” icon and choose the file type.

The screenshot shows the Community First Credit Union interface for a 'SHARE -S00' account. The account balance is \$100.00 (Current Balance) and \$94.99 (Available Balance). The page is updated as of May 7, 2020, at 2:28 PM. The 'Transactions' tab is active. An 'Export' button is highlighted with a red arrow, and a dropdown menu is open, showing options: Spreadsheet (xls), Spreadsheet (csv), Microsoft OFX (ofx), Quicken (qfx), and Quickbooks (qbo). A red arrow points to the 'Microsoft OFX (ofx)' option. Below the menu are 'Reset' and 'Apply Filters' buttons. At the bottom of the screen, there are columns for 'Date', 'Description', and '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.

This screenshot shows the same account page as above, but with a file explorer window open over the bottom. The file explorer shows a file named 'AccountHistory (1).xls'. A context menu is open over the file, with the 'Open' option selected and highlighted by a red arrow. The account page in the background shows the 'Transactions' tab with a table of transactions. The table has columns for 'Date', 'Description', and 'Amount'. Two transactions are visible: 'MAY 1 2020 Deposit Income' and 'APR 30 2020 Dividends Forfeited Uncategorized'. A red arrow points to the 'Open' button in the file explorer.