

FAQ's on Transfers/Transactions Details

How do I make a transfer between my accounts in digital banking?

To transfer between your credit union accounts in digital banking:

- Log In
- Click Move Money > Transfers > Make a Transfer online **or** tap the slideout menu > Transfer > Make a Transfer in the mobile app
- Select your To and From account and amount
- Click More Options to change the frequency and date if desired
- Click Submit

Will my previously created scheduled transfers still work in the new digital banking system?

Yes, all existing scheduled transfers in the previous digital banking system have been moved to the new system.

Where can I view pending transactions on my account?

- Log in
- Select the account you are needing to view
- To view all account activity, view the Activity tile **or** Transactions in the mobile app

How do I search for transactions in digital banking?

Account transactions can be searched in digital banking by amount, date, tags, etc.

Online:

- Log in
- Click **Accounts**
- In the Accounts section, select the account you would like to search
- In the Activity section, select the magnifying glass icon
- Click on the Search and sorting options to open **Advanced Search** in digital banking
- On the Advanced Search window, you can select specific search filters and select **Search**

Mobile app:

- Log in
- Select your account you want to search
- Select Transactions
- Tap the magnifying glass icon



- Tap the icon to use Advanced Search options

How do I add a tag, note, or image to a transaction in digital banking?


You can add notes, tags, and images to any transaction inside of digital banking. To begin:

- Log in
- Click on any account
- Click on Transactions (in mobile)
- Select the Transaction you wish to edit and pull up the transaction's details page
- Click on the appropriate icon for one of the following:
 - Add Tags
 - Add Notes
 - Add Images
- Follow the on-screen prompts to update the transactions
- Close the transaction detail page or tap < Transactions in mobile

Any tags, notes, and images attached to transactions will be accessible on all devices when you log in to digital banking in the future.

How do I download transactions in digital banking?

Account transactions can only be downloaded in digital banking (excluding the app).

- Log In
- Click **Accounts**
- In the Accounts section, select the account you like to download transactions for.
- In the Activity area, select the first icon  next to the print and search icon.
- On the **Download Activity** window, select the **Date range** and **File Type** and click **Download**.

How do I print transactions in digital banking?

Account transactions can only be printed in online banking.

- Log In
- Click the Accounts tab
- In the Accounts section, select the account
- On the Activity section, select the printer icon. Only transactions that show in the Activity section will print.
- A print screen appears with a print preview and print configuration options.
- Using the dialog, configure the print settings and select Print.