

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
Love Where You Bank

Welcome back,
Last login 08/09/2018 at 3:29 PM

Home

Messages

Transactions

Make a Payment

Bill Pay

eCommunications

Locations

Loan Applications

Ready. Set. Mortgage.
No Closing Costs
+ Win \$1,000 in Home Depot gift cards.

Learn More

Transfer Money Now

Debit Card Services

Select a Card *

---- Select Card ----

Mobile Deposit

Search transactions

All Submitted Accepted

Accounts

SHARE -S00

Available Balance \$9,996.24

Current Balance \$10,001.24

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

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Services

SHARE -S00

Last Updated: 8/17/2018 8:31 AM

Search transactions

Filters Details

Options

Date	Description	Amount
AUG 8 2018	Funds Transfer via Online/Deposit Home Banking Transfer - From Share 82	+ \$0.01 \$10,000.01
AUG 8 2018	Deposit by Cash	+ \$10,000.00 \$10,000.00
JUN 30 2018	Dividends forfeited: \$ 0.00	\$0.00 \$0.00

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

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Help

Settings & Alerts

SHARE -S00

Last Updated: 8/17/2018 8:31 AM

Search transactions

Filters Details

Options

Time Period

Transaction Type

Description

Min Amount

Max Amount

Today

Yesterday

This Month

Custom Date

Reset

Apply Filters

Date	Description	Amount
AUG 8 2018	Funds Transfer via Online/Deposit Home Banking Transfer - From Share 82	+ \$0.01 \$10,000.01

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SHARE -S00
Last Updated: 8/17/2018 9:02 AM

\$9,996.24
Available Balance

Search transactions

Filters Details Options

Start Date to End Date

Transaction Type

Description

Min Amount to Max Amount

Check # to

Reset Apply Filters

Date	Description	Amount
AUG 8 2018	Funds Transfer via Online/Deposit Home Banking Transfer - From Share 82	+ \$0.01 \$10,000.01

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

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SHARE -S00
Last Updated: 8/17/2018 9:02 AM

\$9,996.24
Available Balance

Search transactions

Filters Details Options

Start Date to End Date

Transaction Type

Description

Min Amount to Max Amount

Check # to

Reset Apply Filters

- Spreadsheet (xls)
- Spreadsheet (csv)
- Microsoft OFX (ofx)
- Quicken (qfx)
- Quickbooks (qbo)

Date	Description	Amount
AUG 8 2018	Funds Transfer via Online/Deposit Home Banking Transfer - From Share 82	+ \$0.01 \$10,000.01

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

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Welcome back,

Home < SHARE -500 \$9,996.24
Available Balance

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Last Updated: 8/17/2018 9:02 AM

Search transactions Filters Details Options

Start Date	End Date	Transaction Type	Description	Min Amount	Max Amount
8/1/2018	8/11/2018			\$0.00	\$0.00

Check #

Do you want to save AccountHistory.csv from ebanking.communityfirstfl.org? Save Cancel

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Welcome back,

Home < SHARE -500 \$9,996.24
Available Balance

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Last Updated: 8/17/2018 9:02 AM

Search transactions Filters Details Options

Start Date	End Date	Transaction Type	Description	Min Amount	Max Amount
8/1/2018	8/11/2018			\$0.00	\$0.00

Check #

The AccountHistory.csv download has completed. Open Open folder View downloads