

1. On the Home screen, click on an account tile to view a listing of the details and transaction history associated with the account.

NOTE: A listing of historical transactions associated with the account are listed on the screen. The newest transaction will appear on top by default.

2. Click on any transaction line to expand for more detail. Select 'Options' next to a listed transaction to display available actions.

3. Click the magnifying glass to open a search bar where you can quickly search for transactions.

CCOUNTS	/		:
Standard Checking 0080 Available Balance Account Number	\$4,486.44	Standard Checking 0080 Available Balance Account Number	\$2,558.96
External 1st Mortgage 9000 Current Balance Account Number	745.36	Overdraft Line of Credit 0800 Current Balance Account Number	\$0.94

Standard Checking 0080 Last Updated: February 2, 2024 6:32 PM		\$3,122.41 Available Balance
Transactions Details & Settings		
		Q 7 \$≵ ± :
Q Search transactions		
Date 🛩	Description	Amount
JAN 29 2024 Stransfer Transfer		(\$0.01) \$4,486.44
JAN 29 Check Deposit 2024 Income		\$87.48 \$4,486.45
JAN 29 2024 Funds Transfer Transfer		(\$0.01) \$4,398.97

	Toggle Details
Details	Print
Category: Check d	Change Category
Online Description: Check Withdrawal 🖉	Split transaction
Statement Description: Check Withdrawal	
Date: 1/3/2024	
Type: Debit	

Standard Checking 0080 Last Updated: February 2, 2024 4:33 PM		Account Number Available Balar
Transactions Details & Settings		Q 7 \$≠ ± :
Q Search transactions		
Date -	Description ~	Amount

Account Details & History

4. Select the 'Filters' icon to view the various search criteria for transaction history.

Select 'Apply Filters' once the desired options have been selected.

5. Select the Export icon to display a listing of available formats. The export will include all transactions specified in the filter by the user.

6. Select the 'Quick Transfer' icon to perform a quick transfer.

7. Select the 'Options' at the top to print the displayed transactions or initiate a Secure Message with the CPFCU.

- ← Back Standard Checking 0080 \$4,486.44 Last Updated: February 2, 2024 4:06 PM Transactions Details & Settings Q 🍸 💱 🛧 🗄 Time Period Description Transaction Type Min Amount Max Amount s 0.00 to \$ 0.00 Starting Check # Ending Check # Category Apply Filters
- Standard Checking 0080 \$4 486.44 Account Number Last Updated: February 2, 2024 4:06 PM Transactions Details & Settings 4 Ju Q : Y Spreadsheet (xis) Time Period Spreadsheet (csv) Microsoft OEX (ofx) Transaction Type Description Quicken (qfx) Quickbooks (qbo) Min Amouni Max Amount 0.00 to \$ \$ 0.00
- ← Back Standard Checking 0080 \$4,486.44 Account Number Last Updated: February 2, 2024 4:06 PM Transactions Details & Settings Q 7 \$₹ ± : b Time Period Description Transaction Type

Standard Checking 0080		\$3,122.41 Available Balance
Last Updated: February 2, 2024 6:32 PM		
Transactions Details & Settings		Options
		Q 🎖 💱 🔽 🗄
Date 🗟	Description	Print
JAN 29 2024 St Transfer Transfer		Ask a question



- 8. Select 'Options' next to a listed transaction to display available actions.
- JAN 3 O Check Withdrawal Toggle Details
 Details
 Category:
 Check #
 Check #
 Change Category
 Check #
 Check #
 Change Category
 Check #
 Check Withdrawal
 Details
 Print
 Change Category
 Split transaction
 Statement Description:
 Check Withdrawal
 Deta
 Toggle Details
 Details
- 9. Click the 'Details & Settings' tab to display the account details.

ist Updated: Febru	Jary 2, 2024 4:33 PM			Account Number Available Bala
Transactions	Details & Settings			
				G
		DETAILS		
		Account Number	Routing Number 255077736	
		Available Balance \$4,486.44	Current Balance \$4,486.44	
		Origination Date Jan 1, 2001		
		SETTINGS		
		Account Nickname		
		Standard Checking 🖉		
		Visibility on Home (?)		
		Visibility on Financial Tools 🕐		
		Text Banking		
		You are not enrolled in Text Banking,	enroll in Settings	