

Transaction Export Quicken & Excel

Context

How can a member export account transactions from Pyramid FCU's new online banking... as a spreadsheet or for use with Quicken?

Modern User Interface (sometimes called Unified User eXperience or UUX)

First access Account Details by double-clicking on an account. Then choose the Export pick list from the right top of the display of historical transactions.

The screenshot shows the 'Account Details' page for a 'Pay My Bills' account. The available balance is \$16,621.53 and the current balance is \$16,678.31. Below the balances, there is a table of transactions. An 'Export' button is highlighted in yellow, and a dropdown menu is open showing options: Spreadsheet (xls), Spreadsheet (csv), Microsoft OFX (ofx), and Quicken (qfx). The 'Quicken (qfx)' option is also highlighted in yellow.

Date	Description	Amount
1/5/15	Deposit ACH CHASE-RWRD RDM	\$24.05
12/26/14	Withdrawal ACH CREDIT CRD PYMT-PAYMENT	-\$2,592.12

Older User Interface (sometimes called 3x)

First, access account history, either from the History navigation item or by double-clicking an account.

Account History for Pay My Bills - 83492CHK000

This page provides a list of transaction items for your individual accounts. Choose an account from the drop-down list and click 'Submit' to view the detailed history for that account

The screenshot shows the 'Account Details' page for a 'Pay My Bills' account. The available balance is \$16,621.53 and the current balance is \$16,678.31. Below the balances, there is a dropdown menu for 'Account' set to 'Pay My Bills : \$16,621.53'. To the right, there is a 'Display' dropdown menu set to 'Spreadsheet (xls)'. A 'Submit' button is visible at the bottom right.

Change the pick list toward the top that says **Display** to **Export**. Then you can use the pick list next to it to select an export format, including Quicken (qfx).

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