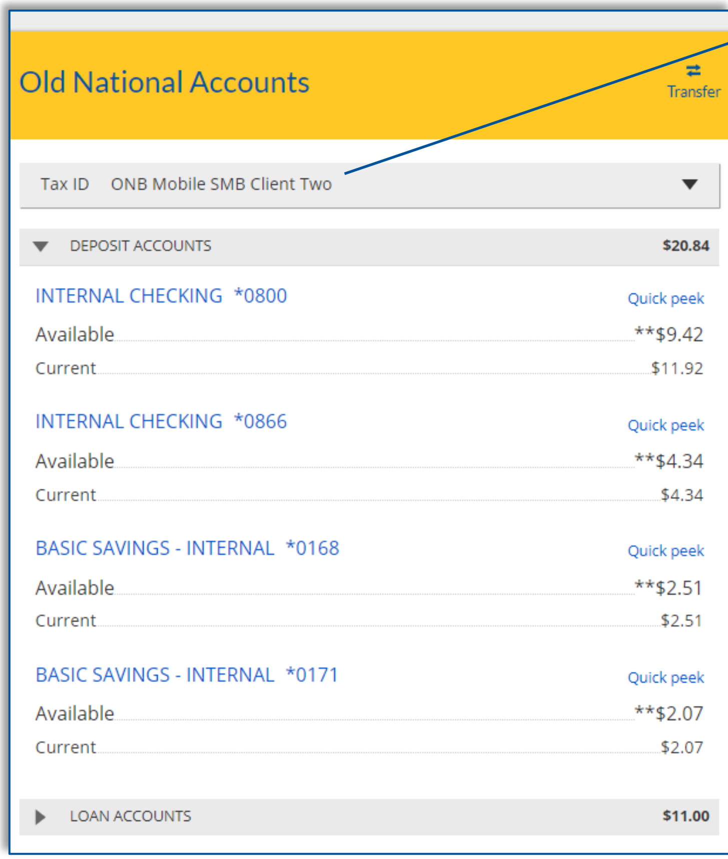
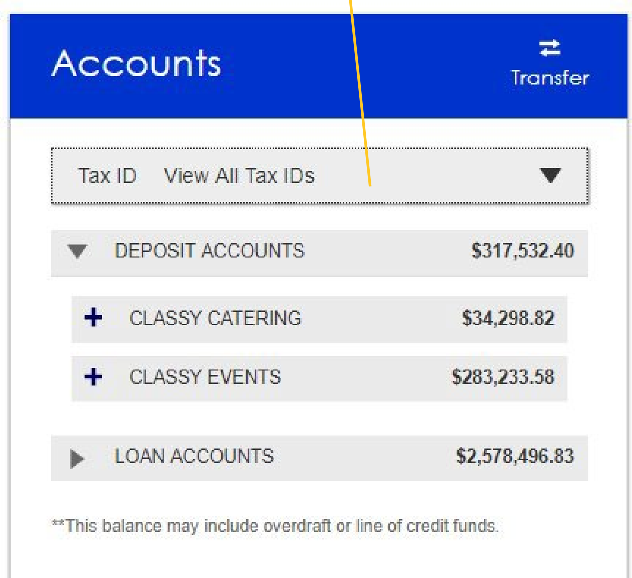
The My Accounts widget on the My Accounts home page is universally important to all businesses. Deposit and loan accounts are available for reconciliation, research, and reporting purposes.

My Accounts: filtered list of Deposit and Loan accounts. View balances; hover over an account for a "quick peek“; select an account to view details.



The selected TIN determines the Deposit and Loan accounts that display (may be CIF, CIS, or member number for your FI).
OR select **View All Tax IDs** to see all deposit/loan accounts together.

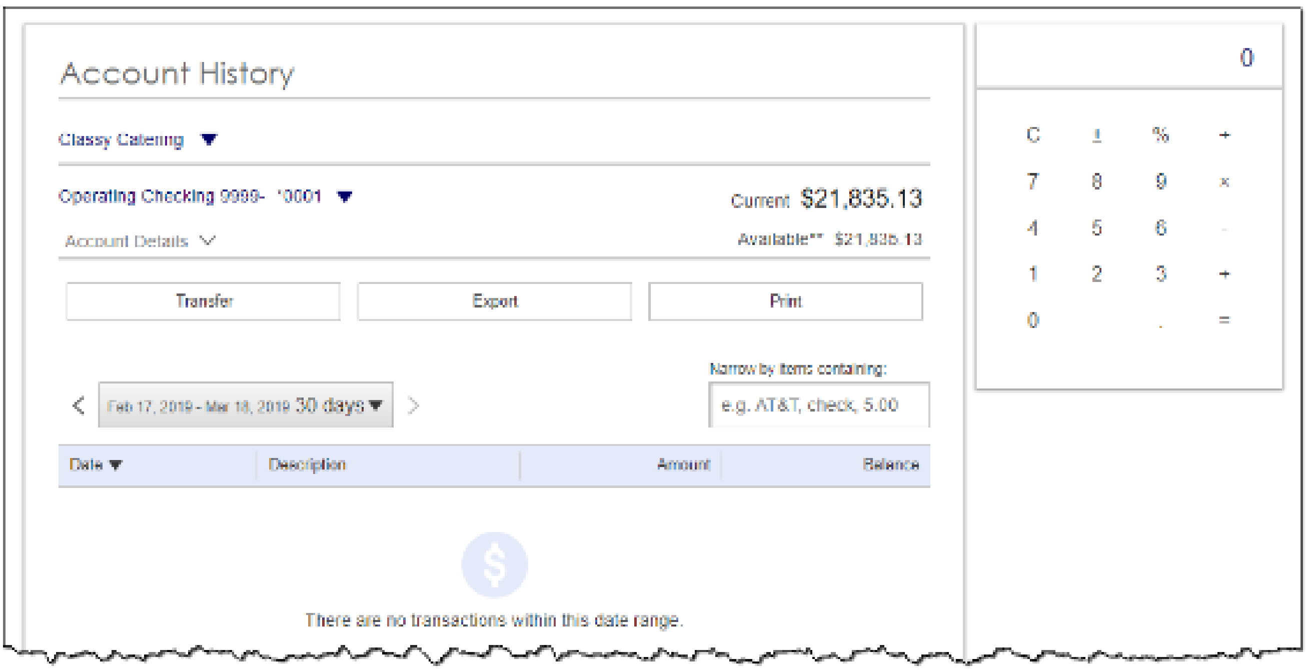


Tips:

- Business Admins can see all TINs and all accounts within each TIN.
- Business Admins can set up business users with access to all accounts, or narrow by TIN and account.

Account Details

1. Jump to another TIN.
2. Jump to another account.
3. **Transfer** money (internal), **Export** transactions (formats below), **Print** the page
    a. CSV – format for downloading into a spreadsheet
    b. OFX – format that's accepted for importing to Quicken and QuickBooks
    c. * QFX – Web Connect for Quicken
    d. * QBO – Web Connect for QuickBooks
4. Change the date range - amount of history depends on how much is retrieved from/provided by the financial institution host.
5. Search for a transaction – good for research purposes



*These show if enabled as options in Online Banking.