Viewing accounts

The following information appears on the Home page for each account:

Account information on the Home page

Name	Description
Account name	The default name for the account or a custom nickname that you create in Settings.
Account number	The masked account number. For your security, only the last part of the number may appear. For example, account number 123456789 may appear as XXXXX-6789.
Balance	The balance for the account.

Tip: If the Home page includes the Summary Metrics graph, you can click or tap the segment of the graph that represents an account to view account information.

Viewing account details

The Account Details page includes the following information:

Account information on the Account Details page

Name	Description
Account Name	The default name for the account or a custom nickname that you create in Settings.

Account information on the Account Details page (cont'd)

Name	Description
Account Number	The masked account number. For your security, only the last part of the number may appear. For example, account number 123456789 may appear as XXXXX-6789.
Available Balance	The available balance for the account, including any pending credits or debits.
Current Balance	The current balance for the account, not including any pending credits or debits.
Credits	The subtotal of the credits to the account. If you filter or search the Account Details page, the total only includes the items in the results.
Debits	The subtotal of the debits from the account. If you filter or search the Account Details page, the total only includes the items in the results.
Transactions	The first 100 transactions in the account, according to the current sort order.

The Account Details page and the Activity Center page both include transactions. A specific transaction can appear on either page or both pages, depending on the transaction status and how you created it. You can view transactions and transaction details on the following pages:

Viewing transactions

Page	Includes
Account Details	All posted and pending transactions in an account, including: • Checks • Deposits • Transactions at branches • Transactions at ATMs • Bill payments • Transfers
Activity Center	Transactions that you create in online banking and the mobile banking app, including: • Recurring transactions • Transfers • Send a check • Wire transfers • Stop payment requests • Address change requests • Check reorders • Payrolls

To view account details

- On the Home page, click or tap the account name. The Account Details page appears.

To view additional transactions

- On the Account Details page, do one of the following:
  - Click or tap the next icon (>) to view the next set of transactions.
  - Click or tap the previous icon (<) to view the previous set of transactions.

To send a secure message about an account

1. On the Account Details page, click or tap **Ask about account**. The New Message window appears. The message automatically includes information about the account.
2. Click or tap the message recipient. The message window appears.
3. Click or tap in the **Message** field and enter your message.
4. (Optional) In online banking, click the attach file icon (✐). In the Open dialog box, select a file to attach to the message, and click **Open**.
5. Click or tap **Send**. The Messages page appears with your new message.

To close the Account Details page

- On the Account Details page, do one of the following:
    - Click or tap the back icon (‹)
    - Click or tap **Home**.

Viewing transactions on the Account Details page

On the Account Details page, you can view the following information for each transaction in an account:

Transaction information on the Account Details page

Name	Description
Date	The date of a completed transaction. If the transaction is not complete, the date is Pending and the transaction has a shaded background.
Transaction Type	The type of transaction.
Amount	The amount of the transaction.
Balance	The account balance after the transaction.
Image	The images associated with the transaction, if applicable

Filtering transactions

On the Account Details page, you can filter the transactions that appear based on the following transaction information:

- Date
- Type
- Amount
- Check number, if applicable

The filter appearance varies. The following examples show the appearance of the filters on different devices.

Transaction filters page in online banking and on a tablet

Transaction filters page on a smartphone

To filter transactions

1. On the Account Details page, click or tap **Show Filters**.
2. Do one or more of the following:
   - Select a date range from the **Time Period** drop-down list. If you select a custom date, specify dates in the **Start Date** and **End Date** calendars.
   - Select the type of transaction from the **Transaction Type** drop-down list.
   - Enter the minimum and maximum amounts for the transaction in the **Min Amount** and **Max Amount** fields.
   - Specify a check number range in the **Check#** fields.
3. Click or tap **Apply Filters**.

> **Tip:** To reset filters and show all transactions, click or tap **Reset**, and click or tap **Apply Filters.**

To hide filters

- On the Account Details page, do one of the following:
  - In online banking or in the mobile banking app on a tablet, click or tap **Hide Filters**.
  - In the mobile banking app on a smartphone, tap **Search**.

Searching transactions

You can use the Account Details page to search the descriptions of the transactions in an account.

To search transactions

1. On the Account Details page, click or tap the **Search description** field.
2. In the **Search description** field, enter the search text. The search results appear on the Account Details page.

Sorting transactions

On the Account Details page, the column headings indicate the sort order of the transactions. The column used to sort includes a triangle icon. The direction of the triangle icon indicates ascending or descending sort order.

> **Tip:** Pending transactions are always grouped together at the top of the sort order.

> **Note:** The Balance column does not appear unless you sort by date.

To sort transactions

1. On the Account Details page, click or tap one of the following column headings to change the sort order:
   - **Date**
   - **Transaction Type**
   - **Amount**
2. Click or tap the same column heading again to change the sort order between ascending and descending.

Exporting transaction records

You can export transactions from the Account Details page to a file format that you select.

> **Note:** Contact us for information about supported versions of Quicken and QuickBooks.

> **Note:** Currently, you can only export in online banking.

To export transactions from the Account Details view

1. On the Account Details page, click **Export**.
2. In the **Export** drop-down list, click one of the following export formats:
   - **Spreadsheet (XLS)**
   - **Spreadsheet (CSV)**
   - **Microsoft OFX (OFX)**
   - **Quicken (QFX)**
   - **QuickBooks (QBO**)
3. Depending on your browser settings, one of the following happens:
   - If your browser automatically saves files to a folder, the file is saved in that folder. Open the folder to view the exported file.
   - If your browser is configured to prompt for the folder for downloaded files, you are prompted to specify the location to save the exported file.

   In the exported file, the transactions appear in the current sort order on the Account Details page.

Viewing transaction details

You can view the details of any transaction in an account.

To view transaction details

- On the Account Details page, click or tap the transaction. Click or tap the transaction again to hide the details.

Viewing and printing images associated with a transaction

You can view and print any images that are associated with a transaction from Account Details page. On the Account Details page, any transaction that includes images is marked with an icon (▤).

To view and print the images associated with a transaction

1. On the Home page, click or tap the name of the account that includes the transaction. The Account Details page appears.
2. Click or tap the transaction to view the details. If applicable, the image appears below the transaction. If the transaction includes multiple images, click or tap **Previous** and **Next** to view additional images.
3. (Optional) In online banking, you can print the images. To print the images, do the following:
    a. On the transaction details, click or tap the Print icon(🖶). The Print page appears.
    b. On the Print page, click or tap **Print** to print the image.

Sending a secure message about a transaction

While viewing the details of a transaction, you can send a secure message to us about the transaction.

To send a secure message about a transaction

1. In the transaction details, click or tap **Ask about transaction**. The New Message window appears.
2. Click or tap the message recipient. The message window appears. The message automatically includes information about the transaction.
3. Click or tap in the **Message** field and enter your message.
4. (Optional) In online banking, click the attach file icon (📎). In the Open dialog box, select a file to attach to the message, and click **Open**.
5. Click or tap **Send**. The Messages page appears with your new message.