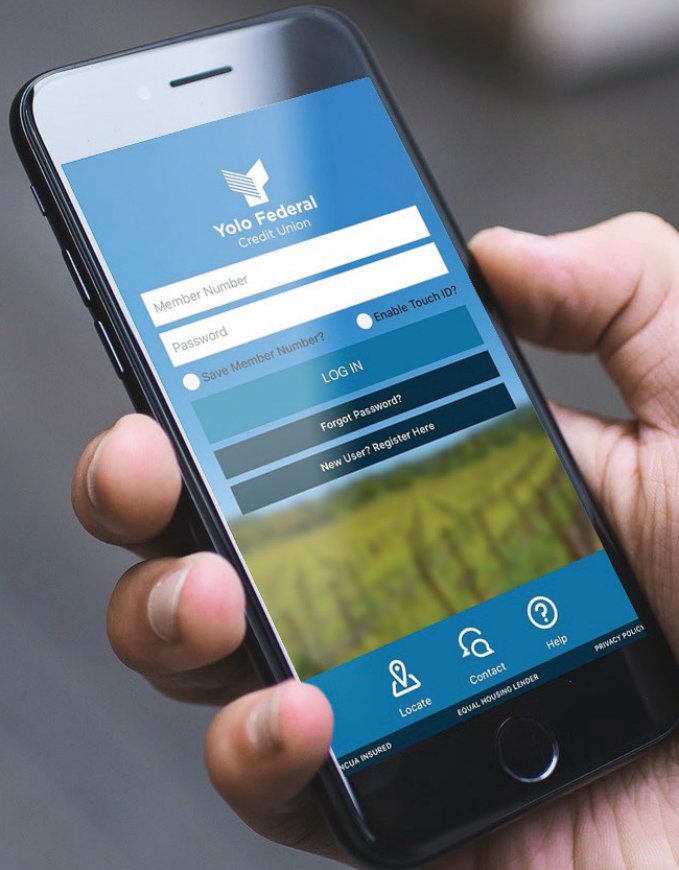




**Yolo Federal**  
Credit Union



USER GUIDE

# Account Reporting

# ACCOUNT REPORTING

The Account Reporting tool gives you the option to pull reports for each of your accounts. It gives you the ability to search for checks, amounts, date ranges, and debit vs. credit transactions.

Click the dropdown menu for Choose Account to choose which account you would like to run a report for. Enter any further details you would like to search for, or leave blank to view all transactions for that account. You can then either save the report or click apply to view the report.

The screenshot shows the 'Account History Report' interface. On the left is a navigation sidebar with categories: 'Account Info' (Accounts, Account Reporting, E-Statements), 'Manage Money' (Check Deposit, Transfer Funds, External Transfers), 'Payment' (Picture Pay, Pay Bills, Pay a Member, Pay a Friend), and 'Other Features' (Manage Cards, Messaging). The 'Account Reporting' option is highlighted with a red arrow. The main content area is titled 'Account History Report' and includes an 'Advanced Search' section with the following fields: 'Choose Account:' (REGULAR SHARES (...99S1) with a clear and dropdown icon), 'Choose Saved Report:' (Select... with a dropdown icon), 'Search By Check Number:' (empty text field), 'Enter Amount Range:' (\$0.00 to \$0.00), 'Choose Date Filter:' (Last 30 Days with a clear and dropdown icon), and 'Transaction Type:' (checkboxes for Debit and Credit). At the bottom are two blue buttons: 'Save Report' and 'Apply'. Red arrows point to the 'Account Reporting' menu item, the 'Choose Account' dropdown, the 'Save Report' button, and the 'Apply' button.