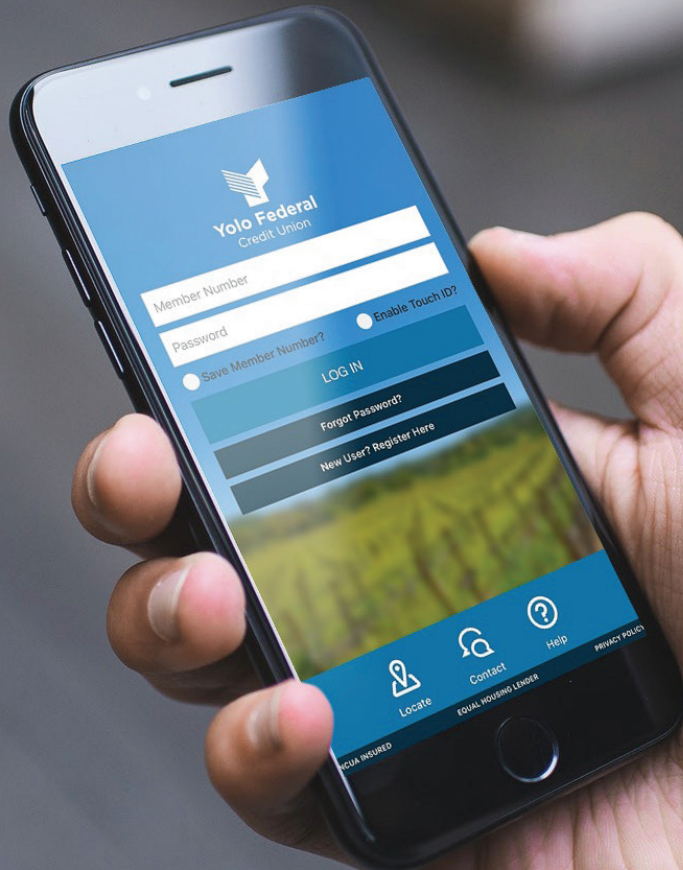




Yolo Federal
Credit Union



USER GUIDE

Accounts

ACCOUNTS

All accounts are listed at the top of the screen in boxes. If there are more than 4 accounts, you will need to click the arrow on the far right to scroll through the remainder of your accounts.

The screenshot shows a row of four account boxes. The first box, 'REGULAR SHARES', is highlighted in dark blue and shows a balance of \$47.01. The other three boxes are light blue. A red arrow points to the right arrow on the far right of the row, indicating that more accounts can be viewed by scrolling.

Account Name	Account ID	Available Balance	Current Balance
REGULAR SHARES	(...99S1)	\$47.01	Current \$47.01
SUB REGULAR SHARES	(...99S2)	\$26.05	Current \$26.05
SIMPLY CHECKING	(...99S5)	\$72.00	Current \$72.00
VISA PLATINUM REW...	(...99L23)	\$500.00	Current \$0.00

The transactions listed below the boxes correspond to the account that is highlighted dark blue. Click on the box you want to view transactions for.

The screenshot shows the Transactions section for the 'REGULAR SHARES' account. The first transaction, dated 05-31-2018, is highlighted with a red arrow. The table lists transactions with their dates, descriptions, amounts, and balances.

DATE	DESCRIPTION	AMOUNT	BALANCE
05-31-2018	Mobile Transfer IB	\$1.00	\$52.00
05-31-2018	Mobile Transfer IB	\$1.00	\$51.00
05-31-2018	Mobile Transfer IB	\$50.00	\$50.00
05-16-2018	CLEAR LOAN	-\$855.05	\$0.00
05-15-2018	S1/L63	-\$65.00	\$855.05
05-03-2018	hello! IB	-\$10.00	\$920.05

To search for a transaction within a specific account, click on the account you want to search and type into the search box.

The interface shows four accounts: REGULAR SHARES, SUB REGULAR SHARES, SIMPLY CHECKING (selected), and VISA PLATINUM REW... Each account displays its current balance. Below the accounts is a 'Transactions' section with a search bar containing 'Penny Winkle'. A red arrow points from the 'SIMPLY CHECKING' account to the search bar. The transaction list shows a single entry on 05-01-2018 for 'CHECK TO - PENNY WINKLE' with an amount of -\$10.00 and a balance of \$74.00.

DATE	DESCRIPTION	AMOUNT	BALANCE
05-01-2018	CHECK TO - PENNY WINKLE	-\$10.00	\$74.00

To download transactions for an account, click on the arrow down button to the left of the search box. You will then have the option to choose whether you want to download a QuickBooks, Quicken, or Comma Delimited (Excel) file. You will then choose the account you want to download transactions for and the time period. Click NEXT and then DOWNLOAD.

The interface shows the same four accounts. Below them is a 'Transactions' section with a search bar containing 'Mobile Transfer IB'. A red arrow points from the 'SIMPLY CHECKING' account to the search bar. The transaction list shows a single entry on 05-31-2018 for 'Mobile Transfer IB' with an amount of \$1.00 and a balance of \$52.00.

DATE	DESCRIPTION	AMOUNT	BALANCE
05-31-2018	Mobile Transfer IB	\$1.00	\$52.00

Export Transactions

Select File Type:
Comma Delimited (CSV)

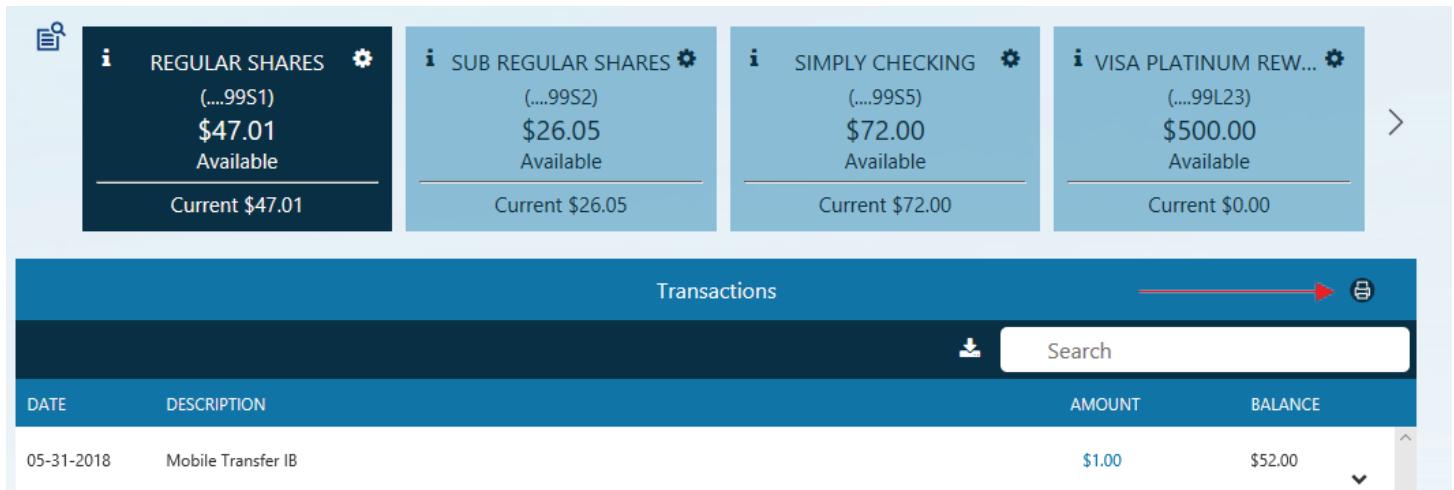
Select Account:
REGULAR SHARES (...99S1)

From:
05-01-2018

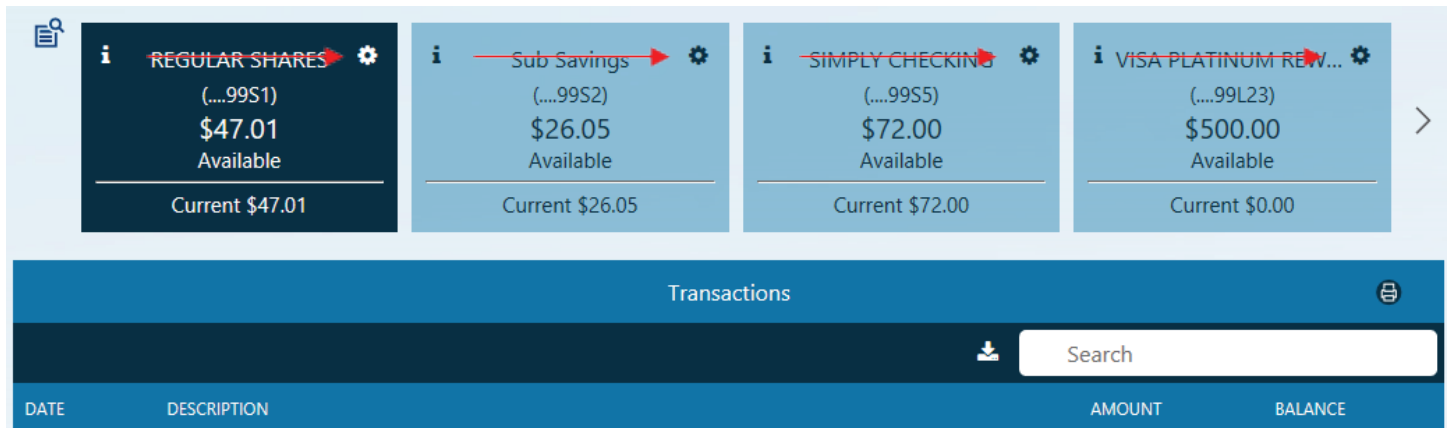
To:
05-31-2018

Next

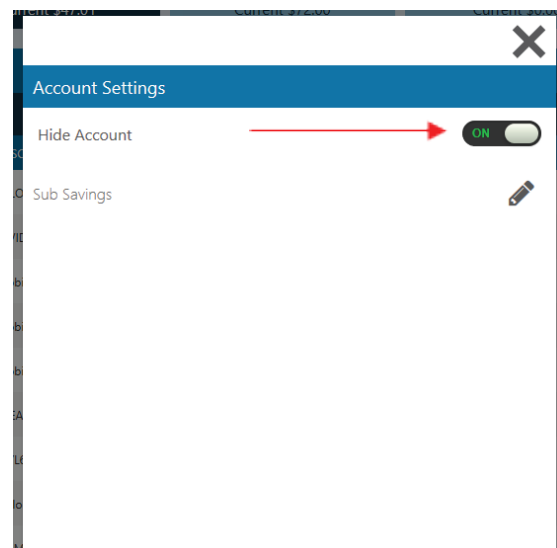
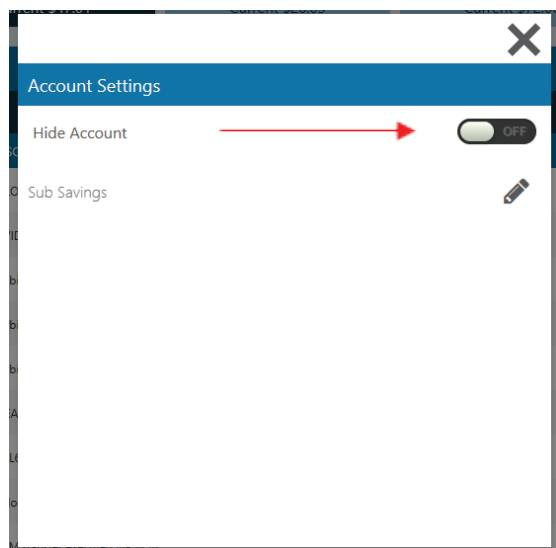
You also have the option to print your transactions for each account. Click on the account you want to print transactions for and then in the right corner click on the printer icon.



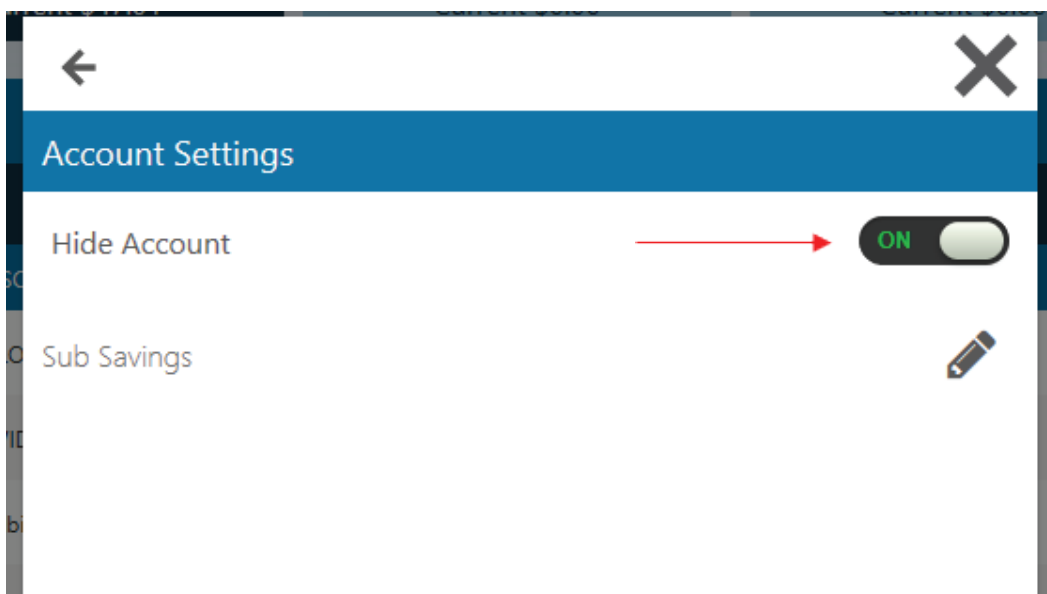
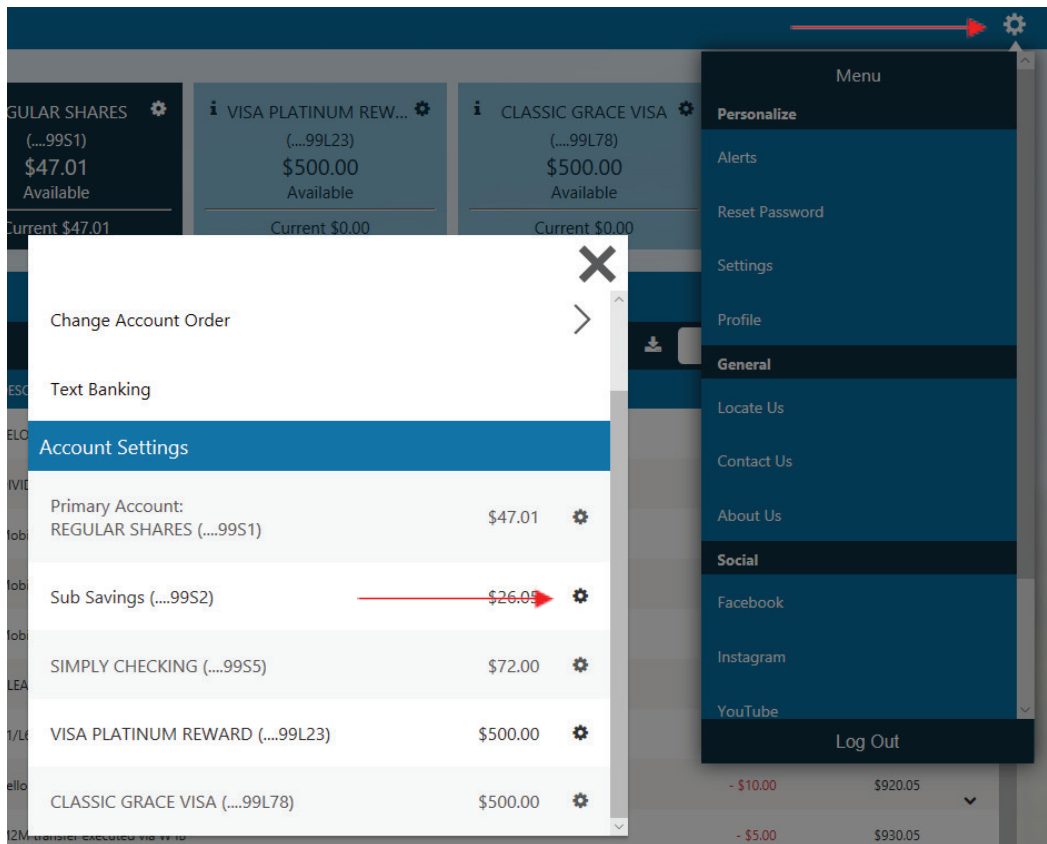
In the top right corner of each account box is a gear icon. Clicking on this icon will give you the option to hide/unhide the account and rename the account.



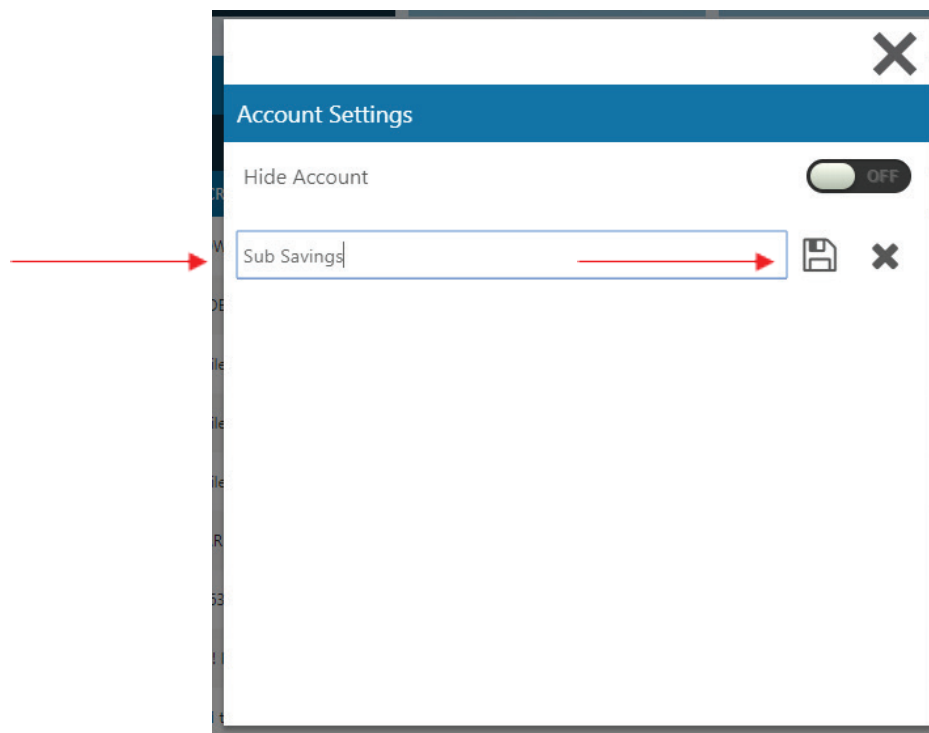
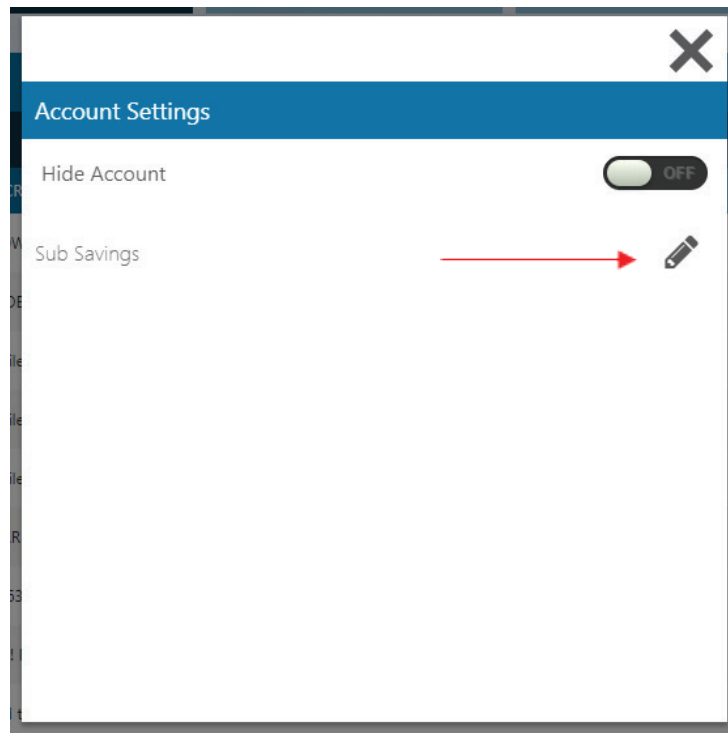
To hide an account, click on the toggle to the right to switch it ON/OFF. Hiding an account will remove it from the boxes at the top of the screen.



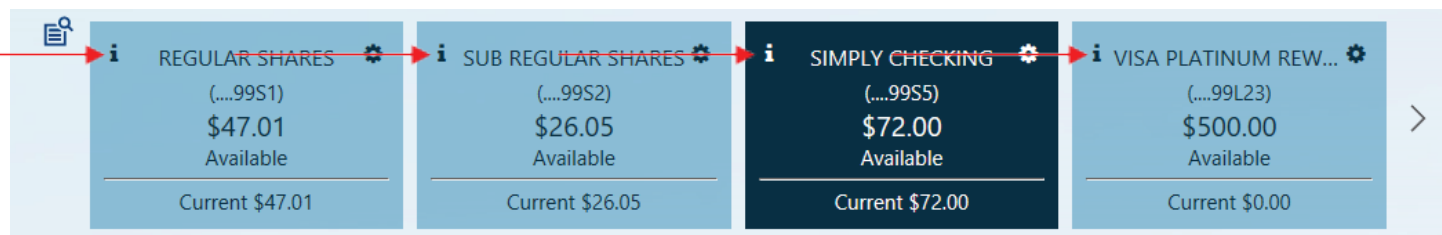
To unhide an account once it has been hidden, go to the gear icon at the top right of the screen. Click on settings and then click on the gear icon to the right of the account that you have hidden. Toggle it back to OFF. Click the X when you are finished to return back to the main dashboard.











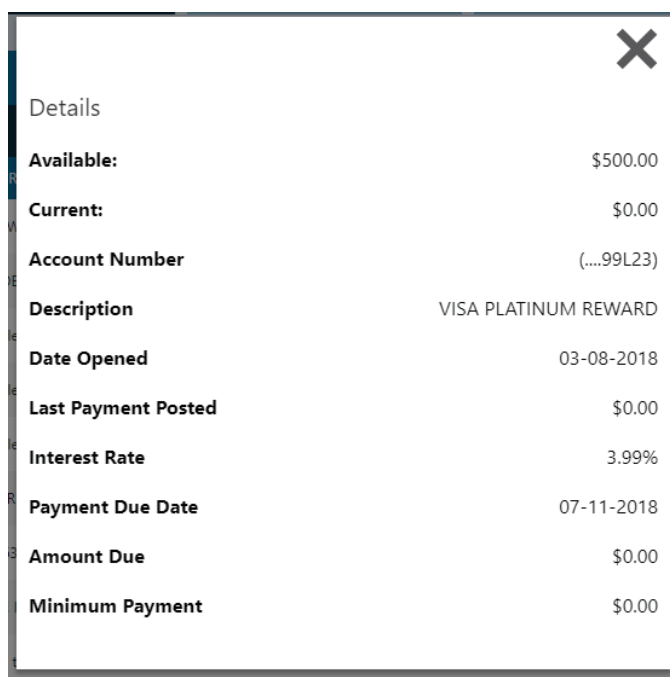
To rename an account, click on the gear icon on the top right corner of the account you want to change the name for. A box will pop up, click on the pencil, and then type on the line the name you want to change the account to. Click the save button to finish.




For additional account details, including payment date and amount due on loans, click on the “i” in the left corner of each account box. A pop-up box will appear with detailed information.



 REGULAR SHARES  (....99S1) \$47.01 Available Current \$47.01	 SUB REGULAR SHARES  (....99S2) \$26.05 Available Current \$26.05	 SIMPLY CHECKING  (....99S5) \$72.00 Available Current \$72.00	 VISA PLATINUM REW...  (....99L23) \$500.00 Available Current \$0.00	>
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Details 	
Available:	\$500.00
Current:	\$0.00
Account Number	(....99L23)
Description	VISA PLATINUM REWARD
Date Opened	03-08-2018
Last Payment Posted	\$0.00
Interest Rate	3.99%
Payment Due Date	07-11-2018
Amount Due	\$0.00
Minimum Payment	\$0.00