How to Export My Account Transactions

Digital Banking allows you to export transactions for your personal records in various file types (i.e. CSV, TXT, OFX, QBO, or QFX). Once exported, your records can be used in other financial or reconciliation programs or provided to an accountant or bookkeeper.

01 Navigate to Accounts

- From the main dashboard, you will have two options to access **Accounts**
  - From your main dashboard, select the **Account** you would like to work with
  - From the left navigation menu, click **Accounts**
    - In the Accounts dashboard, select the **Account** you would like to work with

02 Navigate to Download Activity

- From your historical account activity on the account dashboard, click the **download** icon to select file format and date range
- This will open the Download Activity pop-up

03 Download Activity Statement

- From your Download Activity pop-up, select the following information:
  - **Date Range** – Select "Start Date to End Date" custom range
  - **File Type** – To download the document(s), Select the software you would like to use:
    - Spreadsheet (CSV)
    - Text File (TXT)
    - Open Financial Exchange (OFX)
    - QuickBooks (QBO)
    - Quicken (QFX)
- Click **Download**
  - Please note: The document(s) will be downloaded locally to your device, and you can view, print, or save it to your personal records.