

How to Create Your Own Statement

The screenshot shows a 'Dashboard' page with a notification: 'Is your contact information up to date?'. Below this, there are two account cards. The first is 'Checking' with a balance of \$8,175.76. It lists 'BUSINESS CHOICE CHE...' with a balance of \$8,175.76. The second is 'Savings' with a balance of -\$5.00. It lists 'MEMBERSHIP SAVINGS' with a balance of -\$5.00. A legend indicates 'Available Balance'.

Choose the account for which you would like to create a statement. Just click on the account to open the transaction list.

The screenshot shows the 'Accounts' page with tabs for 'Accounts' and 'Tax Information'. It displays 'All Accounts' with a list of 'Checking' accounts. One account, 'BUSINESS CHOICE CHECK...', is selected. A search bar is visible, and a funnel icon next to it is highlighted with a yellow circle.

Click the Funnel icon next to the search bar.

The screenshot shows the 'Transactions' page with a search bar and a 'Sort By: Default' dropdown. A 'Date Range' dropdown menu is open, showing options: 'Today', 'Last 30 days', 'Last 60 days', 'Last 90 days', 'Year to date', 'Specific Date', 'All Dates Before', 'All Dates After', and 'Date Range'. The 'Date Range' option at the bottom is highlighted with a yellow bar.


Click in the **Date Range** box, which will give you the drop-down list seen here. Click **Date Range** at the bottom of the list.

Clicking **Date Range** will open the calendar seen below. You can click on the arrows at the top of each calendar to toggle to different months. The calendar on the left is labeled **Start date** and the calendar on the right is labeled **End date**. Click on the number to choose your start and end date. For example, if you would like to print a statement for January 2021, click "1" on the Start date calendar and "31" on the End date calendar. Click **Done** when you have chosen your dates.

The screenshot shows a date range selection interface. On the left, there is a sidebar with options: Today, Last 30 days, Last 60 days, Last 90 days, Year to date, Specific Date, All Dates Before, All Dates After, and Date Range (highlighted). The main area contains two calendars for January 2021. The left calendar is labeled 'Start date' and the right is 'End date'. The number '1' is highlighted in the Start date calendar, and '31' is highlighted in the End date calendar. A 'Done' button is visible at the bottom right.


The screenshot shows a transactions filter interface. The 'DATE' field is highlighted in yellow and contains the range '1/1/2021 - 1/31/2021'. Other filter fields include Transaction Amount, Credit or Debit?, Type, Category, and Check Number. A 'Search' button is highlighted in blue at the bottom right.



This will fill in the date. Click the blue **Search** button at the bottom. This will then list only the transactions for the date range that you chose. You can then click the **Funnel** icon again to close the search box.

BUSINESS CHOICE CHEC... 

***** [REDACTED]

Transactions Account Details



DATE DESCRIPTION

Click the **Printer** icon above the transactions.

This will bring up a printable list of transactions just from the date range you chose. You can either print it or save it as a document. To save it, click on your printer. You should see an option to **Save as PDF**. If you choose this option instead of the printer, it will open your files so that you can choose where you would like to save the document.

2/16/2021
Print Transactions

WCCU Credit Union Transaction History


***** [REDACTED]


Statement Period: 01/01/21 to 01/31/21 | Date of Statement: 02/16/2021

Posted Transactions (19)


DATE	DESCRIPTION	DEBITS	CREDITS	BALANCE
01/31/21	0.050% APY Earned 0.06% 01/01/21 to 01/31/21		\$0.07	-\$475.20
01/31/21	Minimum Bal Fee	-\$5.00		-\$475.27
01/29/21	[REDACTED]	-\$20.00		-\$470.27
01/29/21	[REDACTED]	-\$20.00		-\$450.27
01/29/21	[REDACTED]	-\$97.83		-\$430.27
01/29/21	[REDACTED]	-\$20.00		-\$332.44
01/29/21	[REDACTED]	-\$35.06		-\$312.44
01/27/21	[REDACTED]	-\$20.00		-\$277.38

Print 1 sheet of paper

Destination Westby Operations La: 

Pages All 

Copies 1

Layout Portrait 

More settings 