## HOW TO REVIEW YOUR ACCOUNT

Step One: From the Dashboard Tab, click on the account you wish to view or hover over the Accounts Tab, and click on Accounts in the drop down instead. Both methods take you to the same place where you can select the account you wish to review.

in CREDIT						
Dashboard Accounts	Financial Planning	Transfer & Pay	Tools	Quick Links		
Dashboard						e
Accounts Savings			ŝ		Last 15 days There has been no activity for the last 15 day	

Step Two: Under the account name, you will see an eye icon. By clicking this icon, you can view your full account number as well as the account suffix separated by a dash.

in CREDIT UNION		
Dashboard Accounts Financial Planni	ng Transfer & Pay Tools Quick Links	
Accounts Accounts Tax Information		e e
Savings 1 account \$5.00 Primary Savings \$5.00 ***014-1000	<ul> <li>Primary Savings </li> <li>***014-1000 </li> <li>Transactions Account Details Analytics</li> </ul>	Available Balance Current Balance \$0.00 \$5.00
	Search	Sort By: Default V
	description	AMOUNT BALANCE
	AUG 2 2023 Cash Deposit Add a category	<b>\$5.00</b> \$5.00

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Step Three: You can view your transactions in the selected account on the Transactions Tab.

Step Four: On the Account Details tab, you can see the nickname, balance, and available balance of the selected account.

Step Five: On the Analytics Tab, you can look at spending breakdown and balance history of the selected account.

in CREDIT UNION		
Dashboard Accounts Financial Planni	ng Transfer & Pay Tools Quick Links	
Accounts Tax Information          Savings         1 account       \$5.00         • Primary Savings       \$5.00	<ul> <li>Primary Savings </li> <li><sup>***014-1000</sup> ⊕</li> <li>3</li> <li>4</li> <li>5</li> <li>Transactions</li> <li>Account Details</li> <li>Analytics</li> </ul>	Available Balance       Current Balance         \$0.00       \$5.00
***014-1000	Search	Sort By: Default V A
	AUG 2 2023 Add a category	<b>\$5.00</b> \$5.00