



Export Transactions

Easily export your transaction through online banking. Follow the steps below.

Step 1

To export transactions, login to online banking and select your account.

The screenshot shows the Saratoga's online banking interface. At the top, there are navigation tabs: Accounts, Transfers, Pay Bills, and Pay People. Below this, the 'Accounts' section is active, displaying a list of accounts. The first account, 'MY CHECKING 1234500', is highlighted with a red arrow. Below the accounts list, there is a section for 'Upcoming Bills'.

Step 2

Under MORE ACTIONS, select Export Transactions.

The screenshot shows the 'Account Details' page for 'MY CHECKING 1234500'. The account balance is \$100.00. On the right side, there is a 'MORE ACTIONS' dropdown menu. A red arrow points to the 'Export transactions' option within this menu. Below the account details, there is a 'Transaction Details' section with search filters for Type, Keyword, and Date.

Step 3

Select the date range to view transactions and choose the file format to export.

The screenshot shows the 'Export transactions' dialog box. It is titled 'Export transactions' and shows the account 'MY CHECKING 1234500'. The 'From' date is 7/10/2020 and the 'To' date is 8/19/2020. The 'Format' dropdown menu is open, showing options: 'Please select a file format...', 'Comma separated (CSV)', 'Intuit Quickfile (QFX)', 'Money (OFX)', and 'QuickBooks (QBO)'. A red arrow points to the 'Format' dropdown menu.