VIEW ACCOUNTS

This is the main screen of the service. You will find your PSB&T deposit and loan accounts and outside accounts you have added, PSB&T information Tiles, and Tiles for Net Worth, Goals and Budgeting.

The top section named My Accounts includes the total number of PSB&T accounts and the total balances. In addition, you will find three symbols to download transactions, Search transactions, or add accounts you have with credit card companies, other banks or credit unions, and brokerage companies, if you have online access to them.

View Transactions

Click on any account and you will see transactions listed in posting date order. To see more transactions either continue to scroll down the list and the system will load more transactions or click the Search symbol and select the information and date range.

View image of paid check - click inside the transaction box and the front and back of the check appear.

View image of deposit – click inside the transaction box and the front and back of the deposit ticket appears. To view check(s) deposited, they are listed below and click on each one to view.

Changing Categories

Click on the transaction, click Category, either select a new category or click the + symbol on the top left of Category, enter the name you want, then click the green check box and it will be added.

Transaction Downloads

Click on the account, click download symbol (arrow down with line under it), select download format, select start and end date then Download.

- Quicken Users – *for conversion only* - instructional information is provided to assist you. Note, it will be easy to duplicate transactions and the instructions will help minimize this.
- Mint Users – *for conversion only* – do not use the Mint service until June 7th