UT Federal Credit Union

Your Community Credit Union

Consumer Banking User Guide

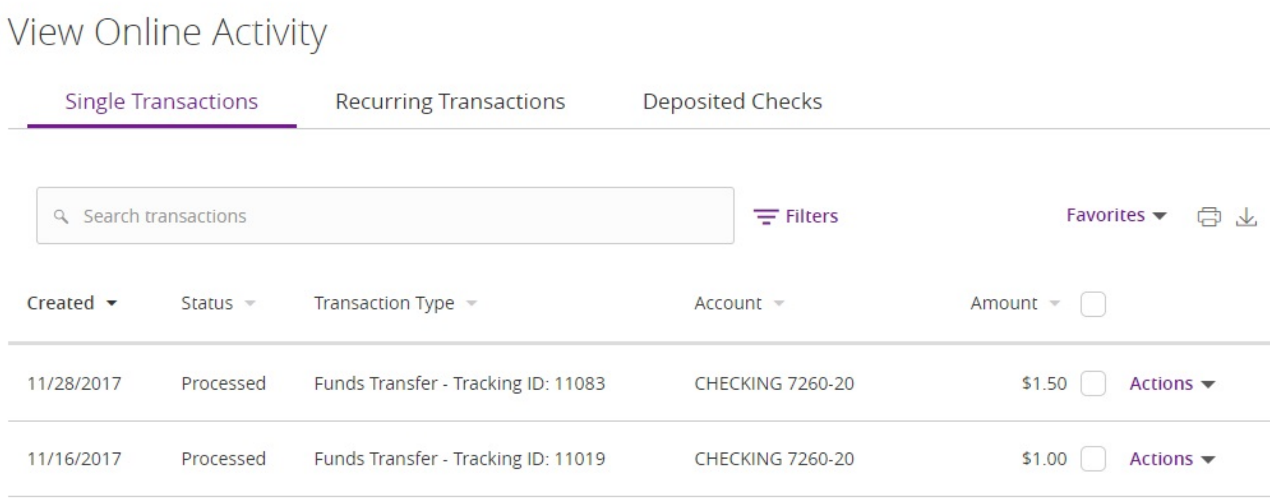
Online Activity Center

Contents

Using the Online Activity Center

The Online Activity Center displays details for recent transactions initiated online. You can sort, search, filter, and manage transactions on this page. In the Online Activity Center, all scheduled recurring transactions appear on the Recurring Transactions tab. You can use the Recurring Transactions tab to view or cancel the recurring series. You can also see checks that have been deposited on the Deposited Checks tab.

The Online Activity Center

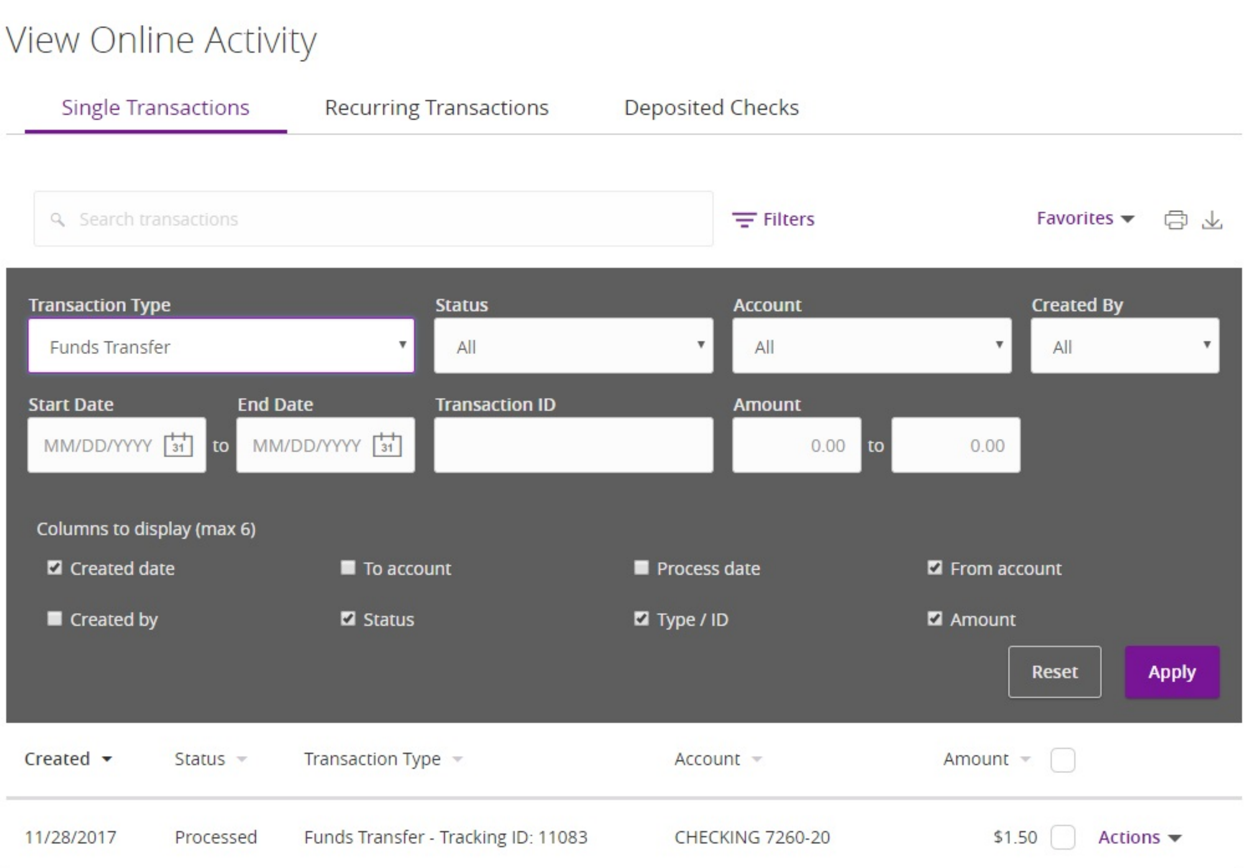


You can customize the transaction details that appear in the Online Activity Center by selecting up to six fields. Options vary by transaction type, but may include:

- Amount
- Approvals
- Beneficiary Financial Institution
- Create Date
- Created By
- From Account
- Intermediary Financial Institution
- Message to Beneficiary
- Payment Template (name)
- Process Date
- Recipients
- Status
- To Account
- Transaction Type and ID

You can utilize these fields to approve or cancel transactions, as well as export or print the filtered data.

The Online Activity Center – Filters



The Single Transactions tab includes transactions that do not recur and any recurring transaction due in the next seven calendar days. You can use the Single Transactions tab to view or cancel a specific transaction in a recurring series.

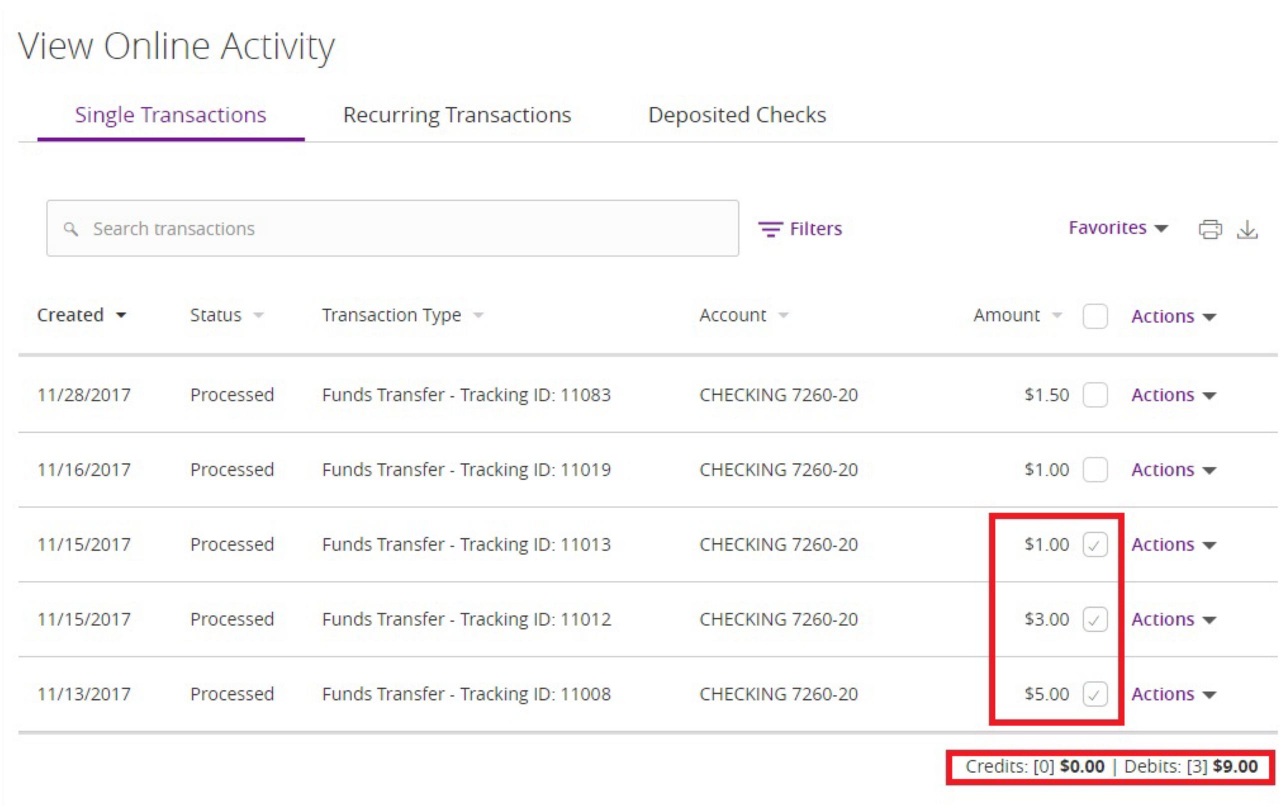
When you have pending approvals waiting, the number of pending approvals appears on the tabs.

Online Activity Center tabs with number of pending approvals

Tip: You can also view transaction details on the page where you created the transaction.

You can select individual check boxes to view the total debits and credits of the selected transactions.

The Online Activity Center



Furthermore, click or tap an individual transaction to expand the transaction details. Depending on the transaction type, transaction details in the Online Activity Center may include the following:

• Tracking ID	• Process date	• Created date
• Created By	• To Account Type	• From Account
• To Account	• Beneficiary Financial Institution Name	• Beneficiary Financial Institution Address

Creating custom views in the Online Activity Center

You can select up to six fields to control which data appears in the Activity Center for each transaction type. For example, a user responsible for reviewing wire transactions can select Message to Beneficiary and Beneficiary Bank as two columns of data that will appear, and then save the custom view as a Favorite for later use.

To create a custom view in the Activity Center

1. In the navigation menu, click or tap **Move Money** > **View Online Activity**.
2. Click or tap **Filters** on the Single Transaction tab.
3. In the filter fields that appear, select a **Transaction Type** and, optionally, a **Status**.
4. When Column names with check boxes appear, select up to six columns that you want to view.

> Note: After six columns are selected, you must clear a selected check box before selecting a new check box.

5. Click or tap **Apply Filters**.
6. (Optional) Click or tap **Favorites** to save the custom view for later use.

Sorting transactions in the Online Activity Center

In the Online Activity Center, you can choose to sort transactions by the column headings.

To sort transactions

- In the Online Activity Center, click or tap any column header to change the criteria by which transactions are sorted.

Tip: Click the column heading again to change the sort order between ascending and descending.

Searching for transactions overview

When you search, you enter terms to locate specific account information. Some examples of things that you can search for include:

- Transactions greater than $500
- All pending transactions
- All transactions in the last week

When you perform a transaction search, you can search for any of the following fields by typing keywords or using the Filters option:

Basic search transaction fields

Field	Notes
Type	The type of transaction, such as Funds Transfer, Withdraw by Check, Bill Payment, etc.
Status	The status of the transaction.
Account	The account to search.
Start Date	The creation date for the transaction.
End Date	The end date for the transaction, if applicable.
Created by	The user that created the transaction.
Amount	The amount of the transaction. You specify a range of amounts to include in the search.
Transaction ID	The number that uniquely identifies the transaction.

Tip: Click or tap **Filters** to see the full list of fields you can use to better define your search.

Searching for a transaction in the Online Activity Center

When searching transactions in the Online Activity Center, you can search across multiple types of information, not just the transaction description:

Search examples

Keywords	Search result
Transactions over $25	All transactions that are at least $25.01, regardless of type, appear.
ACH	Any ACH transactions, including ACH Payment, ACH Payments, ACH Single Receipt, ACH Collections, and ACH PassThru, appear.
Tracking #23489	The transaction with tracking ID #23489 appears.

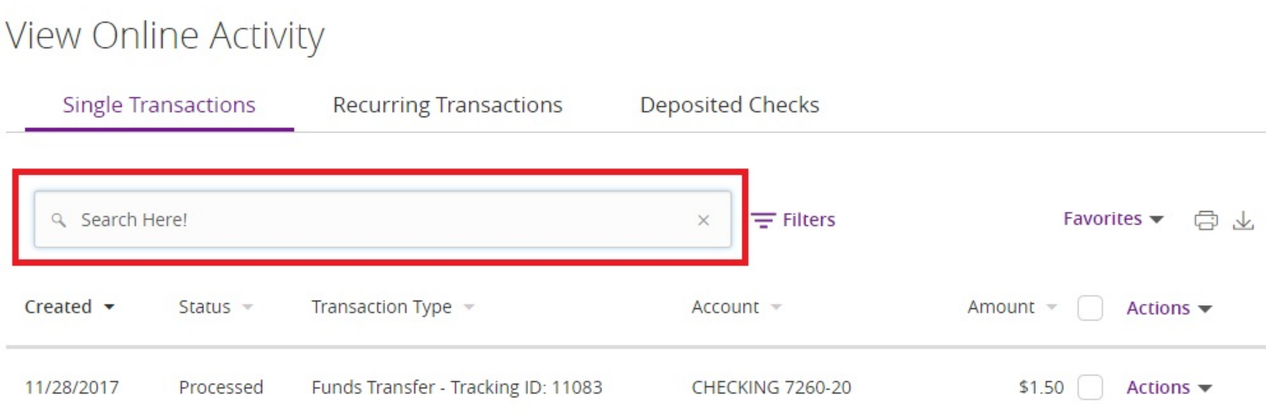
In the Online Activity Center, you can search for a transaction in the following ways:

- Typing keywords in the **Search transactions** field
- Using the Filters option to filter transactions by certain fields

> Note: The exact appearance of the search fields may vary depending on your configuration.

To search for a transaction

1. In the navigation menu, click or tap **Move Money > View Online Activity**. The Online Activity Center page appears.
2. Enter text in the **Search transactions** field.



3. Click or tap the magnifying glass icon or press **Enter**. The results display all matching payments and transfers.

To use filters

1. In the navigation menu, click or tap **Move Money > View Online Activity**. The Online Activity Center page appears.
2. Use the **Filters** button to specify the values to include in the search.
3. Click or tap the magnifying glass or press **Enter**.
4. In the search results, click or tap on a transaction for additional details. The results of a Basic search include transactions that match all the search conditions.

To save a favorite search

1. In the navigation menu, click or tap **Move Money > View Online Activity**. The Online Activity Center page appears. Click or tap the **Search transactions** field.
2. In the **Search transactions** field, enter your search text.
3. On the Online Activity Center page, click or tap the **Favorites** drop-down list.
4. Click or tap **Save As New** to save the search.
5. In the Save Search window, enter a name for the favorite and click or tap **Save Search**.

6. In the success message, click or tap **Close**. The search result is saved and can be accessed later.

To repeat a favorite search

- On the Online Activity Center page, click or tap **Favorites** and click or tap the favorite search that you want to use. The search results appear.

Viewing transaction details overview

On the Online Activity Center page, the details that appear when you expand a transaction to display its details may vary depending on the type of transaction and may include:

Transaction details in the Activity Center

Name	Description
Tracking ID	A unique internal number that identifies the transaction.
Created	The date that the transaction was created.
Created by	The Login ID of the user who created the transaction.
Will process on	The date that the transaction will be processed.
Amount	The amount of the transaction.
Description	A short description of the transaction.

The details can also include other information specific to the Transaction Type.

Viewing transactions in the Online Activity Center

The Online Activity Center page includes all transactions that you create in online and mobile banking, including recurring transactions. It features online transactions only.

To view transactions on the Online Activity Center page

1. In the navigation menu, click or tap **Move Money** > **View Online Activity**. The Online Activity Center appears.
2. Click or tap the transaction. The transaction expands to show the details.

> Tip: Click or tap the transaction again to hide the details.

Canceling pending transactions

Use the Online Activity Center to cancel a pending transaction. If you cancel a transaction on the Recurring Transactions tab, you cancel all future recurrences of the transaction. If you cancel a single transaction in a recurring series on the Single Transactions tab, you cancel the single occurrence, not the entire series.

To cancel one or more pending transactions

1. In the navigation menu, click or tap **Move Money > View Online Activity**. The Online Activity Center page appears.
2. Browse or search for the transactions that you want to cancel.
3. In the Online Activity Center, select the check box for each transaction that you want to cancel, click or tap the **Actions** drop-down list, and select **Cancel Selected**.
4. When prompted, click or tap **Confirm** to verify the cancellation. The status of the items will change to Canceled in the Online Activity Center.

Copying a transaction

If you need to copy a transaction, use the Online Activity Center to copy an existing transaction.

To copy a transaction

1. In the navigation menu, click or tap **Move Money > View Online Activity**. The Online Activity Center appears.
2. Browse or search for the transaction that you want to copy.
3. Click or tap a transaction.
4. From the **Actions** drop-down list, click or tap **Copy**. A new transaction of the same type appears with the fields already filled.
5. Make any needed changes to the transaction. The procedure that you use to make the changes varies, depending on the type of transaction.
6. When you are satisfied with your changes, submit the new transaction.

Sending a message about a transaction

You can use the Online Activity Center to send a message about a transaction.

To send a message about a transaction

1. In the navigation menu, click or tap **Move Money > View Online Activity**. The Online Activity Center appears.
2. Browse or search for the transaction that you want to send a message about.
3. Click or tap the item.
4. In the **Actions** drop-down list, click or tap **Inquire**.

> Note: The message automatically includes information to identify the transaction. You do not need to add transaction details to the message.

5. Click or tap in the **Message** field and enter your message.
6. (Optional) In online banking, click the attach file icon (📎).

> Note: Click or tap **Supported Attachments** to see the supported file types of documents you can attach.

7. In the Open dialog box, select a file to attach to the message, and click **Open**.
8. Click or tap **Send**. A message appears confirming that you sent the message.
9. Click **Close**. The Conversations page appears.

Printing transaction details from the Online Activity Center

In online banking, you can print transaction details in the Online Activity Center.

> Note: You can only print from a desktop, not from a tablet or smartphone.

To print from the Activity Center

1. On the Home page, click or tap **Move Money > View Online Activity**. The Online Activity Center appears.
2. Click or tap the transaction to view the details. If applicable, the image appears below the transaction. If the transaction includes multiple images, click or tap **Previous** and **Next** to view additional images.
3. In the **Actions** drop-down list, click or tap **Print Details**. The Print page appears in another window or tab.
4. On the Print page, click or tap **Print**.

Exporting by Transaction Type in the Online Activity Center

You can export transactions by Transaction Type in the Online Activity Center to a file format that you select. Export formats will vary depending on the settings.

Note: You can only export data in online banking, but not in mobile banking.

To export by Transaction Type in the Activity Center

1. In the navigation menu, click **Move Money > View Online Activity**.
2. Select multiple transaction check boxes, then click the export icon ( ). A window appears where you can download separate XLS files that contain details about exported files, grouped according to transaction type.
3. Click **Download** on the desired transaction type to download the related XLS file.