



## Common Transactions

### How do I make a transfer between my accounts in Online Banking?

To transfer between your credit union accounts:

- Log In
- From the Dashboard, the left-hand menu, or from within a specific account click **Transfers** > **Make a Transfer**
- Select your **From** and **To** account and amount
- Click **More Options** to change the frequency and date if desired
- Click **Submit**


### Where can I view pending transactions on my account?

- Log in
- To view a specific account, select the account from the Accounts list > Click **Transactions**
- To view all account activity, view the Transactions Activity tile on the Dashboard. Click **See More** to expand the transaction history. (This option consolidates activity for all share and loan records.)


### How do I search for transactions in Online Banking?

Account transactions can be searched in online banking by amount, date, tags, etc.

Online Banking:

- Click the magnifying glass icon  from the Transactions screen.
- Use the search box or **Click Search and Sorting Options** and use the filters to customize your search.

Mobile App:

- Select your account you want to search
- Select Transactions
- Tap the magnifying glass icon
- Tap the  icon to use Advanced Search options

### How do I view my eStatements?

Electronic statements and tax documents are available to view in both Online and Mobile Banking.

- Log in
- Click on any account
- Click on *Documents*
- Choose the document type you want to view from the dropdown
- Click the name of the document in the Name column to open the document

If you are not yet enrolled in eStatements but want to receive account documents electronically, see our eStatement Resource Document [here](#) for enrollment instructions.

### How do I add a tag, note, or image to a transaction in Online Banking?


You can add notes, tags, and images to any transaction inside of Online Banking. To begin:

- Log in
- Click on any account
- Click on *Transactions* (in mobile)
- Select the Transaction you wish to edit and pull up the transaction's details page
- Click on the appropriate icon for one of the following:
  - Add Tags
  - Add Notes
  - Add Images
- Follow the on-screen prompts to update the transactions
- Close the transaction detail page or tap < Transactions in Mobile


Any tags, notes, and images attached to transactions will be accessible on all devices when you log in to Online Banking in the future.

### How do I download transactions in Online Banking?

Account transactions can only be downloaded in online banking (not in the mobile app).

- Log In
- Click *Accounts*
- In the Accounts section, select the account you like to download transactions for.
- In the Activity area, select the first icon  next to the print and search icon.
- On the *Download Activity* window, select the *Date range* and *File Type* and click *Download*.

### How do I hide or unhide an account on Online Banking or Mobile Banking?

- Log In
- Choose a specific share or loan from the Dashboard or Account list
- Tap the  icon or *Settings* button
- Select or deselect the toggle to control whether you view balances and activity in the Mobile app or on Online Banking

### How do I print transactions in Online Banking?

Account transactions can only be printed in online banking (not in the mobile app).

- Log In
- Click the **Accounts** tab
- In the Accounts section, select the account
- On the Activity section, select the printer icon. Only transactions that show in the Activity section will print.
- A print screen appears with a print preview and print configuration options.
- Using the dialog, configure the print settings and select **Print**.

### How do I pay a bill in Online Banking?

You can use Online Banking to pay a bill or pay a person.

- Log in
- Select **Move Money > Payments** or tap **Pay** under your account
- If it is your first-time using Payments, it will ask you to enroll, click Enroll
- Select **Pay a bill** or **Pay a person** (online only)
- Select the merchant or person you would like to pay
- Select an account to take funds from, and then input the Amount
- If you would like to set the date for the payment, select **More Options** and select the desired date
- Select **Submit**

### How do I pay a person (Person-2-Person payment) in Online Banking?

You can use Online or Mobile banking to pay a person.

- Log in
- Select **Pay** (mobile) or **Pay a bill** (online)
- If it is your first-time using Payments, it will ask you to enroll, click **Enroll**
- Select **Pay a person > Person to pay** (To add a new person, select **Add another person** and fill out the necessary information) or Select the person to pay in mobile
- Select an account to take funds from, and then input the Amount
- If you would like to set the date for the payment, select **More options** and select the desired date
- Select **Submit**

### How do I rename or personalize an account name ?

You can rename any account in Online Banking.

- Log in
- Select an account from the Accounts section
- Select **Settings** from the options menu
- Next to the account name, select **Rename**
- Type the new name, and then select **Save**

### How do I change the order my accounts are displayed?

You can rearrange the order your accounts display to reflect the sequence you want.

- Log In
- From the Accounts click on the three dots and click *Organize Accounts* in online or click the opposing arrows in mobile
- Drag and drop the accounts to rearrange the order
- Click *Done*

### How can I change my contact information?

You can update your phone number or email address directly in Online Banking. However, physical or mailing addresses must be changed by contacting Freedom.

- Log In
- Click on the *User Profile* icon and click Settings
- Click *Edit* next to your phone or email
- Verify your password
- Edit your contact information
- Click *Save*

Updates made in Online or Mobile Banking are for the primary member only. Updates will happen immediately. If updates are needed for other account owners/signers, please contact Freedom.

### How do I change my username or password in Online Banking?

To change your username:

- Log in
- Select your username icon in the top right corner or menu in Mobile Banking
- Select *Settings* and then select Security option on the left side menu
- In the Username field select *Edit*
- Enter your current password when prompted
- Change your username and select *Save*

To change password:

- Log in
- Select your initials icon in the top right corner or on your name on the menu on the lower left
- Select *Settings* and then select *Security*
- In the Password field select *Edit*
- Enter your existing password, and then enter a new password
- Select *Save*

### How do I access Money Smart?

Money Smart is a Personal Financial Management tool that you can use online or from your mobile device. To access:

- Log in to either Online or Mobile banking
- On the dashboard click on any account to go to the account details page
- On the account details page, from the options section, click on the *Money Smart* link

If you have not previously used Money Smart, your Freedom accounts will automatically sync and you can begin tracking spending, setting budgets, and planning your financial future.