

Saving Account History From Online Banking

1. Log into your online banking by visiting: <https://online.northernbirchcu.com/OnlineBanking/>
Enter your User ID and Password, then click "LOGIN."

NORTHERN BIRCH CREDIT UNION

Login

[Online Banking Help](#)
[Forgot Requirements](#)
[Learn more about online banking](#)

Login by entering your User ID and Password:

User ID

Password

LOGIN

[Add a Memorized Account](#)

Get in Touch

(416) 465-4659
1-866-844-3829

Send us an email

2. Select the account from which you would like to save the transaction history by clicking on the link with that account's name. (This process is the same for all accounts)

NORTHERN BIRCH CREDIT UNION

Logout

Home > Online Banking > My Accounts

My Accounts

View Account Activity

Payments

Transfers

Account Services

Alerts

Profile and Preferences

Last logged in on Wed, Mar 3, 2021, 12:31 PM, EST via Online Banking. [Print This Page](#) | [Online Banking Help](#)

Account Summary

Account: [REDACTED]

Membership	Account Name	Balance
[REDACTED]	PERSONAL [REDACTED]	[REDACTED]
[REDACTED]	PREMIUM SAVINGS [REDACTED]	[REDACTED]

Scheduled Bill Payments

Date	To Payee	From Account	Amount
You currently do not have any Bill Payments Scheduled.			

Scheduled Transfers

From Account	To Account	Date	Amount
You currently do not have any Transfers Scheduled.			

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Changes ahead.

We are changing our banking system. Click here to read more and to see what you may need to do to prepare.

turbotax

3. You will see the following box which will allow you to select the account history you would like to download. Select the date range button, and select the date span you would like to save using the drop-down calendar, boxed in red below.

Search Account Activity

Account

Show most recent transactions in the last 30 days

Date Range From To

Monthly

[Advanced Options](#)

Search Account Activity

Account

Show most recent transactions in the last 30 days

Date Range From To

Monthly

[Advanced Options](#)

Feb 2021						
Su	Mo	Tu	We	Th	Fr	Sa
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28						

4. Next, click the “Advanced Options” button at the bottom of the Account Activity box. Then, open the “Format” drop down menu, and choose “Download to PDF.” When the format menu closes, click the “Search” button at the bottom.

The screenshot shows the 'Search Account Activity' interface. At the top, there is a search bar and a dropdown menu for 'Account' set to 'PERSONAL 1'. Below this, there are options for 'Show' (50 most recent transactions in the last 30 days) and 'Date Range' (From 09/03/2016 to 09/03/2021). There is also a 'Monthly' dropdown set to 'March 2021'. The 'Advanced Options' link is highlighted with a red box. Below it, the 'Show' dropdown is set to 'all statement items'. The 'Format' dropdown menu is open, showing various options, with 'Download to PDF' highlighted in blue and also marked with a red box. A 'Search' button is visible at the bottom left of the interface.

5. When the page below appears, click “Continue” to download your account history PDF.

The screenshot shows a dialog box titled 'Account Activity - PDF'. It contains a warning message: 'Warning: Enhanced Security will be temporarily disabled to allow this download. The downloaded PDF file will be stored on this computer. If you are using a public computer, please delete this file after use.' Below the warning, there are two buttons: 'Continue' (highlighted with a red box) and 'Cancel'.

- The download will appear in the bottom left corner of your browser on a grey bar. Once it is finished downloading, click the file to open it. You can now choose where you would like to save it by clicking the down arrow in the top right corner of the screen seen below, boxed in red. A "Save As" window will appear and allow you to choose where to save it.



- Enter the name you would like to save it as in the "File Name" bar, and press the "Save" button. You can now refer to this PDF to see your past account activity following our system conversion.

