Downloading Bill Pay and Account History

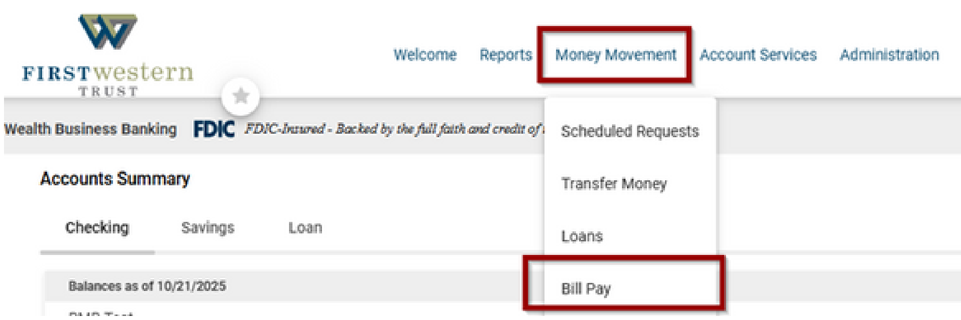
MYFW Digital Business Banking Platform Guide

This guide provides steps on downloading your bill pay and account history from the iWealth Business Banking platform. Sign in to your current business online banking portal and follow the steps detailed below. Please reach out to your Private Banker for support.

Note: Completing this process prior to transitioning to our new digital banking platform is essential, as your bill pay and account history will not automatically transfer.

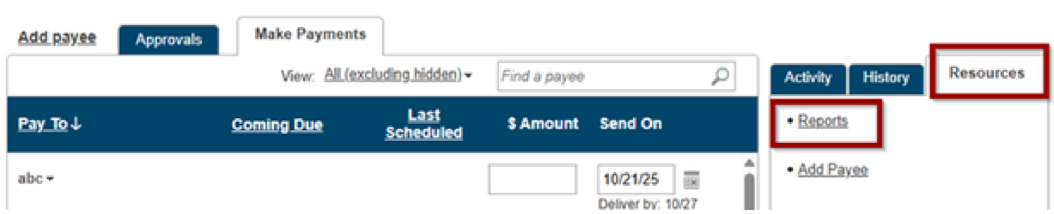
Downloading Your Bill Pay History

- Click on the **Money Movement** tab, then **Bill Pay.**

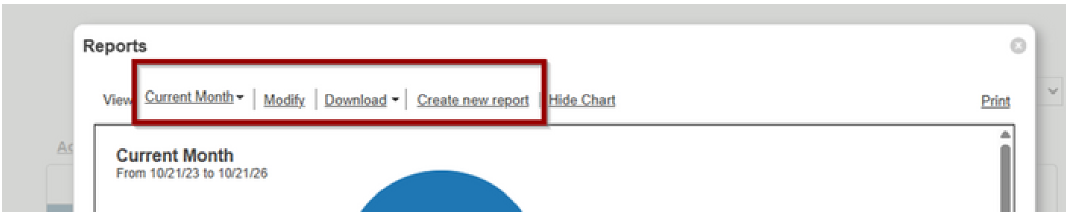


Bill Pay page:

- On the Bill Pay page, please select the Resources tab located on the right-hand side.
- Under the Resource tab, select Reports.

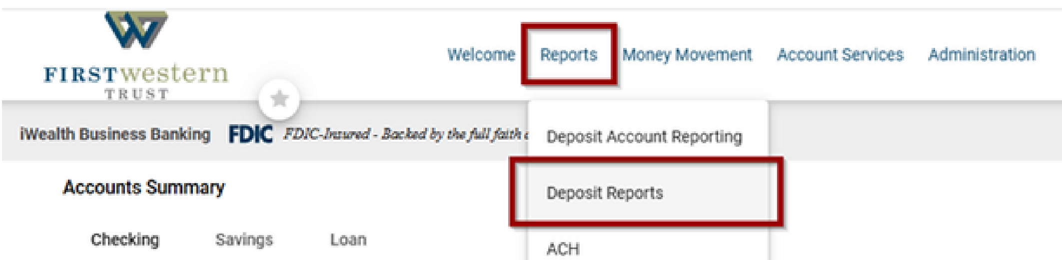


- A Reports popup will open where you can choose data from the past 12 months, adjust report options, select a download type (CSV or QuickBooks file), or create a custom report.
    - Your downloaded report will appear in your computer's downloads folder.

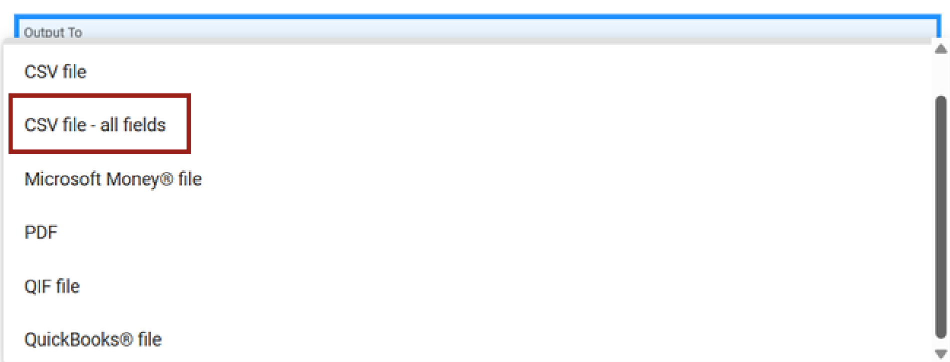


Downloading your Account History

- Click on the **Reports** tab, then **Deposit Reports.**



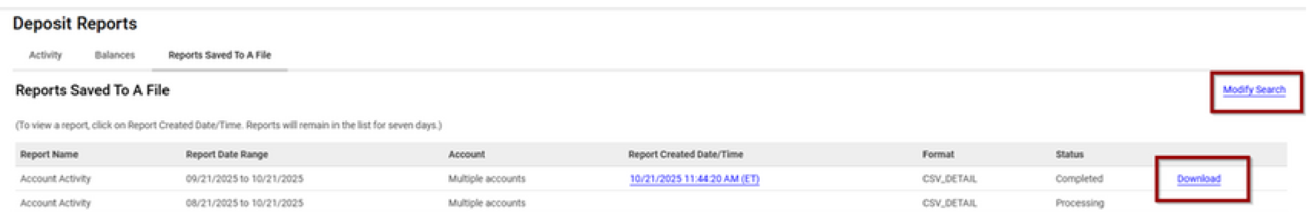
- Click on the **Output To** dropdown menu.
    - When you click on the down arrow, the following options are provided.
    - We highly encourage the CSV file - add fields.



- After choosing the output file, select an **Account** or choose all accounts.
- Under **Date** choose **Date Range**
  - Account history is retained for up to 18 months and may be downloaded in increments of three months at a time.
- **Transaction Type**: Choose All Transactions to capture all your account history.
- Under **Advanced Search Options (Optional)**: The ‘description’ field allows you to enter details such as account information or dates, making it more efficient to locate your files.
- Click **Search.**

Deposit Reports page:

- The following page will provide a hyperlink to ‘download’ your report - This may take a minute to load.
  - The ‘Modify Search’ link will allow you to go back and modify the date or any other information.



Questions?

Please reach out to your Private Banker for support.

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