

# eStatements

## **Quick Reference Guide**

Release 24.08

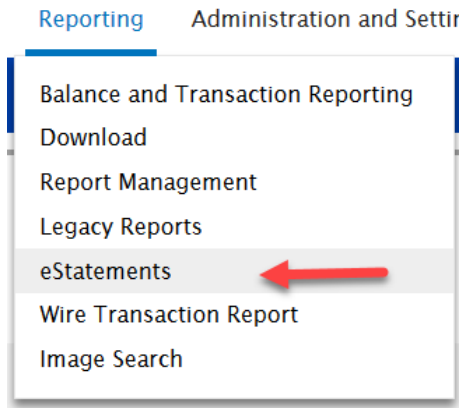
August 2024

## eStatements Search

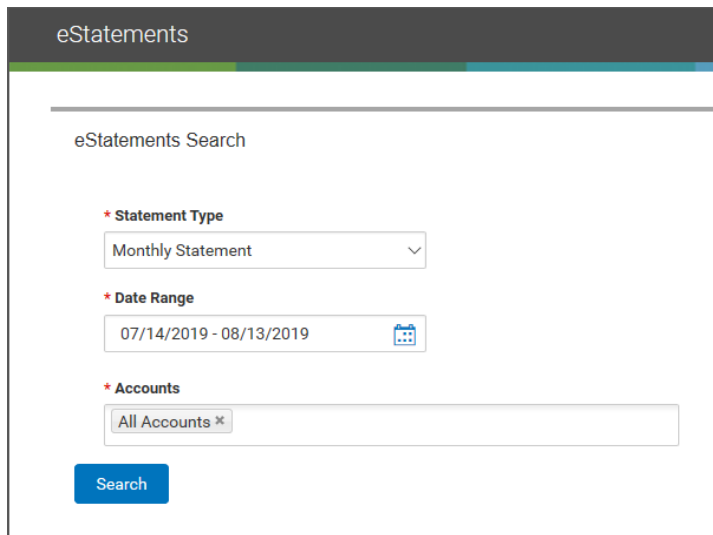
The eStatements Search feature lets you find specific eStatements based on statement type and date.

**To search for and download eStatements:**

1. Select **eStatements** from the **Reporting** menu.



The system displays the eStatements Search screen.

A screenshot of the 'eStatements Search' screen. The page has a dark header with the word 'eStatements' in white. Below the header, the title 'eStatements Search' is displayed. The form contains three main sections: 1. '\* Statement Type' with a dropdown menu currently showing 'Monthly Statement'. 2. '\* Date Range' with a text input field showing '07/14/2019 - 08/13/2019' and a calendar icon to its right. 3. '\* Accounts' with a text input field showing 'All Accounts \*'. At the bottom left of the form is a blue 'Search' button.

2. Select the appropriate statement type. Available types will vary by bank.

3. Select the desired range of dates: Last 7 Days, Last 30 Days, Last 60 Days, Last 90 Days, Month to date, Quarter to date, Year to date, Prior Day, or Last Month.

You can also select **Custom Range**. Use the pop-up calendars to select the range of dates, and click **Apply**.

eStatements

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eStatements Search

**\* Statement Type**

**\* Date Range**

**\* A**

- Last 7 Days
- Last 30 Days
- Last 60 Days
- Last 90 Days
- Month to date
- Quarter to date
- Year to date
- Prior Day
- Last Month
- Custom Range

	Jul 2019							→	←	Aug 2019						
	Su	Mo	Tu	We	Th	Fr	Sa		Su	Mo	Tu	We	Th	Fr	Sa	
									28	29	30	31	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	29	30	31	
	4	5	6	7	8	9	10		1	2	3	4	5	6	7	

The eStatements list appears.

4. To download a statement, select the desired one in the list, and click **Download** in the **Actions** column.

eStatements Search ⚙️

\* **Statement Type**

\* **Date Range**

\* **Accounts**

Filter

Actions	Statement Date	Account Number	Client Account Name	⚙️
Download	02/28/2017	0000000001	One	
Download	02/28/2017	1122334601	CAEFT PMTS RBCCACH CAD 1	
Download	02/28/2017	1122334601	LC account	
<b>Download</b>	02/28/2017	1122334602	CL Account	
Download	02/28/2017	1122334611	LC account	
Download	02/28/2017	1122334612	CL Account	
Download	02/28/2017	1122334621	LC account	
Download	02/28/2017	1122334622	CL Account	
Download	02/28/2017	1152334603	LC account	
Download	02/28/2017	1152334604	CL Account	

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## Downloading Multiple eStatements

Your version of the application may be configured so that you can download multiple eStatements at one time. If so, do the following to download multiple eStatements:

1. Check the checkboxes to the right of the **Actions** column, OR check the **All** box to download all listed eStatements.

eStatements Search ⚙

\* **Statement Type**  
 Monthly Statement ▼

\* **Date Range**  
 02/01/2020 - 02/06/2020 📅

\* **Accounts**  
 All Accounts ✕

**Search**

Filter Select fields ▼

<input checked="" type="checkbox"/> All	Actions	Statement Date	Account Number	Client Account Name	⚙
<input checked="" type="checkbox"/>	Download	12/31/2020	1010334513	CLNTACCNAME513	
<input checked="" type="checkbox"/>	Download	12/31/2020	1010334514	CLNTACCNAME514	
<input checked="" type="checkbox"/>	Download	12/31/2020	1010334517	CLNTACCNAME517 &	
<input checked="" type="checkbox"/>	Download	12/31/2020	1122334-508	CLNTACCNAME508	
<input checked="" type="checkbox"/>	Download	12/31/2020	1122334-509	CLNTACCNAME509	
<input checked="" type="checkbox"/>	Download	12/31/2020	1122334455	1122334455	
<input checked="" type="checkbox"/>	Download	12/31/2020	1122334458	1122334458	
<input checked="" type="checkbox"/>	Download	12/31/2020	1122334500	CLNTACCNAME500	
<input checked="" type="checkbox"/>	Download	12/31/2020	1122334501	CLNTACCNAME501	
<input checked="" type="checkbox"/>	Download	12/31/2020	1122334502	CLNTACCNAME502	

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2. Click the **Download** button at the bottom of the list.

<input checked="" type="checkbox"/>	Download	11/30/2020	1010334514	CLNTACCNAME514
<input checked="" type="checkbox"/>	Download	11/30/2020	1010334514	CLNTACCNAME514
<input checked="" type="checkbox"/>	Download	11/30/2020	1010334517	CLNTACCNAME517 &
<input checked="" type="checkbox"/>	Download	11/30/2020	1010334517	CLNTACCNAME517 &
<input checked="" type="checkbox"/>	Download	11/30/2020	1122334-508	CLNTACCNAME508
<input checked="" type="checkbox"/>	Download	11/30/2020	1122334-508	CLNTACCNAME508
<input checked="" type="checkbox"/>	Download	11/30/2020	1122334-509	CLNTACCNAME509
<input checked="" type="checkbox"/>	Download	11/30/2020	1122334-509	CLNTACCNAME509
<input checked="" type="checkbox"/>	Download	11/30/2020	1122334455	1122334455
<input checked="" type="checkbox"/>	Download	11/30/2020	1122334455	1122334455
<input checked="" type="checkbox"/>	Download	11/30/2020	1122334458	1122334458
<input checked="" type="checkbox"/>	Download	11/30/2020	1122334458	1122334458
<input checked="" type="checkbox"/>	Download	11/30/2020	1122334500	CLNTACCNAME500
<input checked="" type="checkbox"/>	Download	11/30/2020	1122334500	CLNTACCNAME500
<input checked="" type="checkbox"/>	Download	11/30/2020	1122334501	CLNTACCNAME501
<input checked="" type="checkbox"/>	Download	11/30/2020	1122334501	CLNTACCNAME501
<input checked="" type="checkbox"/>	Download	11/30/2020	1122334502	CLNTACCNAME502
<input checked="" type="checkbox"/>	Download	11/30/2020	1122334502	CLNTACCNAME502
<input checked="" type="checkbox"/>	Download	11/30/2020	1122334503	CLNTACCNAME503

Viewing 1-50 of 290 records Display  per page < Page  of 6 >

**Download**

A success message appears in the eStatements Search widget.

✓ Your download request was successfully submitted as ID 247 and placed in the File Downloads section.

The file appears in the Download widget at the bottom of the eStatements workspace.

3. Locate the downloaded file in the list, click the **View** drop-down menu in the **Actions** column, and then click **Download**.

Download ⚙

[Export](#) 🔄 02/06/2020 03:28 PM

Filter

<input type="checkbox"/> All	Actions	Export Type	File Name	Status	Message	File Size	⚙
<input type="checkbox"/>	View <b>Download</b>	ESTATEMENT Export	MONTHLYEstatement02062020_202002.zip	Complete		200000	
<input type="checkbox"/>	View	ESTATEMENT Export	WEEKLYEstatement02052020_030209.zip	Complete		7000	
<input type="checkbox"/>	View	ESTATEMENT Export	QUARTEREstatement02052020_025823.zip	Complete		7000	
<input type="checkbox"/>	View	ESTATEMENT Export	MONTHLYEstatement02052020_024543.zip	Complete		3000	
<input type="checkbox"/>	View	ESTATEMENT Export	MONTHLYEstatement02052020_024230.zip	Complete		2000	
<input type="checkbox"/>	View	ESTATEMENT Export	MONTHLYEstatement02042020_234508.zip	Complete		20000	
<input type="checkbox"/>	View	BAI Export	BAIEXP_14122018_015926.txt	Complete		8689	

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**Note**

Your financial institution may want to prevent the downloading of multiple statements of a certain type (for example, credit card statements), in which case the feature described above will not be available for those statements.

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