Accounts

Summary

The Accounts tab will show you a general overview of your account. At the top of the page, you will see your member number and the address we have on file. While under the Account tab, you may click **Print** in the upper right-hand corner. This creates a page formatted specifically for printing.

Insured Accounts Summary

The Insured Accounts Summary section displays a general overview of your insured accounts, including the account title, type, balance and available balance.

To view the details of an insured account, click on the **Account Title**. Your current transaction activity will then be displayed.

You may also view additional account history by going to the Next History Date Range, selecting dates using the fields provided and clicking **More History**.

Your savings are federally insured to at least $250,000 by the National Credit Union Administration, a U.S. Government Agency.

Loan Summary

The Loan Summary section displays a general overview of your loans, including the loan title, type, balance, available balance, rate, payment and the due date.

To view the details of your loan, click on the **Loan Title**. Your current transaction activity will then be displayed.

You may also view additional account history by going to the Next History Date Range, selecting dates using the fields provided and clicking **More History**.

Credit Cards

The Credit Cards section displays an overview of your credit card accounts.

To view an overview of your current credit card cycle, click on the **credit card number**, or the **Overview** button on the corresponding row. Click on the **More Details** button to view additional information, view statements, add/remove a card, sign-up for eStatements, view eStatements, make a one-time payment or set-up a recurring payment from an external account, request a Balance Transfer/Consolidation, provide a Travel Notification, Dispute a Transaction or sign-up/manage Mastercard Fraud Alerts.

Transfer Funds

This option allows you to transfer funds between your accounts. The completion of a transfer is subject to the availability of sufficient funds in the account you are transferring from. If you do not have sufficient funds, the transaction will not be completed.

TO TRANSFER FUNDS:

1. Click on **Transfers** tab.
2. Enter the amount you'd like to transfer in the field provided. Do not include dollar signs or commas.
3. Select the account you would like to transfer from (only eligible accounts will appear).
4. Select the account you would like to transfer to (only eligible accounts will appear). If you are transferring funds to a different member number, their eligible accounts will be displayed next to their member number.
5. Click on **Transfer Funds**.

External Accounts

This option allows you to transfer funds between your CEFCU accounts, accounts at other financial institutions as well as other CEFCU accounts that you are not a joint owner of. The completion of a transfer is subject to the availability of sufficient funds in the account you are transferring from. If you do not have sufficient funds, the transaction will not be completed.

TO ADD AN EXTERNAL ACCOUNT:

1. Click on **External Accounts** which is located under the Accounts tab.
2. Under the Add A New Account section, select **New Account** from the Account Type dropdown menu.
3. The screen will expand. Enter the requested information in all of the fields.
4. If the account is within CEFCU you will check the box next to 'Check this box if this is a cross-account at the same institution'.
5. In the Ownership area, you need to specify if you are the Owner or Joint Owner for the financial institution you are adding.
6. Click the **Add Account** button.
7. Read the instructions and verify the information on the next screen then click the **Confirm** button.

TO TRANSFER FUNDS TO AN EXTERNAL ACCOUNT:

1. Click on **Transfers** which is located under the Accounts tab.
2. Enter the amount you'd like to transfer in the field provided. Do not include dollar signs or commas.
3. Select the account you would like to transfer from (only eligible accounts will appear).
4. Select the account you would like to transfer to (only eligible accounts will appear). If you are transferring funds to an External Account, the eligible account(s) will be displayed next to the account number.
5. Click on **Transfer Funds**.

Export

The Export option allows you to download your financial history to your computer for use with personal financial management software such as Quicken. If you would like to download your account history but do not use financial management software, a CSV (Comma Separated Values) format of your history is also available.

TO EXPORT YOUR TRANSACTION HISTORY:

1. Under the Accounts tab, click on the **Export**.
2. Select the account you'd like to export history for.
3. Select the date range.
4. Select an export format.
5. Click on **Download Data**.

Dashboard

Dashboard is a multifunctioning interface that organizes and presents account information and transaction options in a way that is easy to read. The eBranch dashboard is designed to create an at a glance view of your accounts with CEFCU as well as provide easy access to services such as account transfer and alert management from the convenience of one screen.

TO SET THE DASHBOARD AS YOUR DEFAULT PAGE:

1. Click on Accounts
2. Click on Dashboard
3. Check "Make this your default page" box