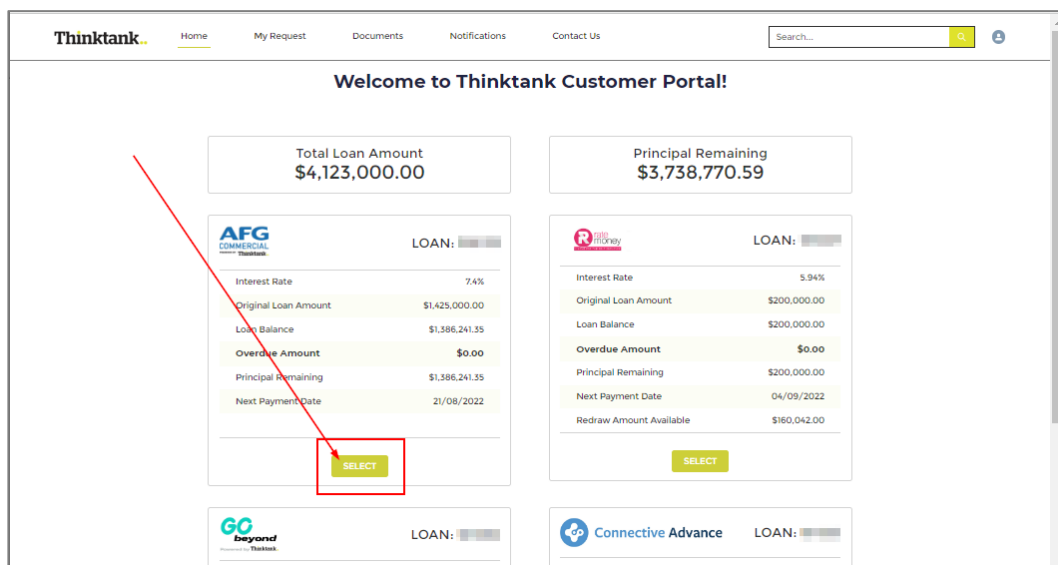


VIEW AND SORT TRANSACTIONS

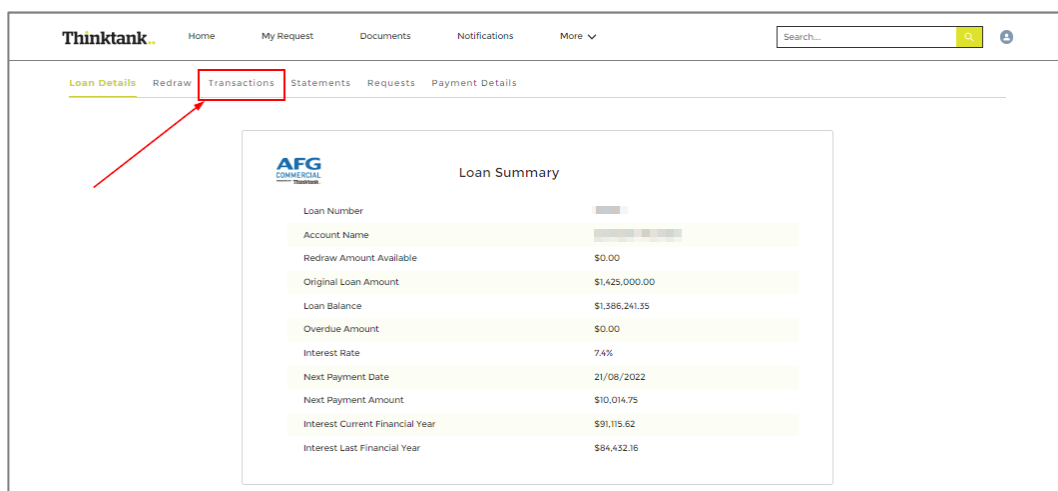
Transactions can be viewed and exported to several formats that you can review or upload to your accounting software, including: CSV, Word, Excel, XML and QIF

IMPORTANT: If you require a Statement on letterhead, go to the Statements tab to view and download published statements. For an out-of-cycle statement (for a select period or the most recent transactions since the last statement), you will need to contact the Loan Support Team to request an Out-of-Cycle statement (fees apply).

1. After login, each of the loans currently linked to the Borrower should appear on a screen page with summaries of each of the loan(s). Click **Select** on the loan you wish to view the transaction history.

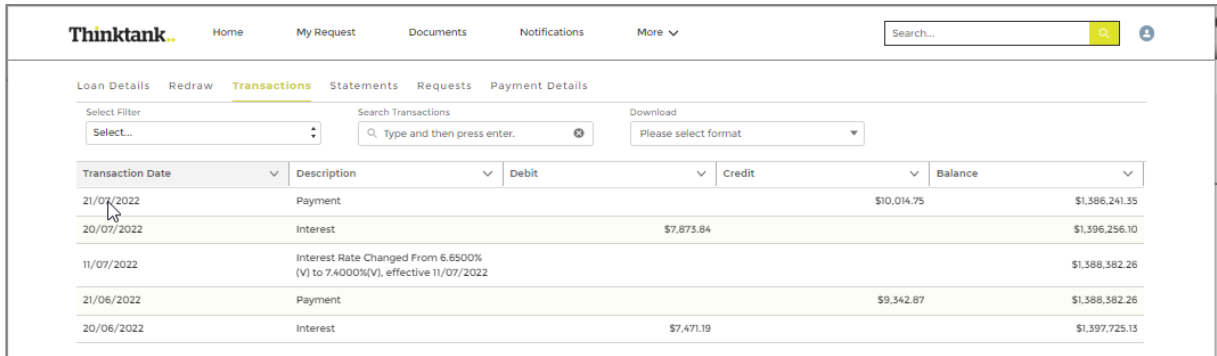


2. Once you have selected the loan you wish to view, the next screen will display the "Loan Details" tab. Click on the **Transactions** tab.

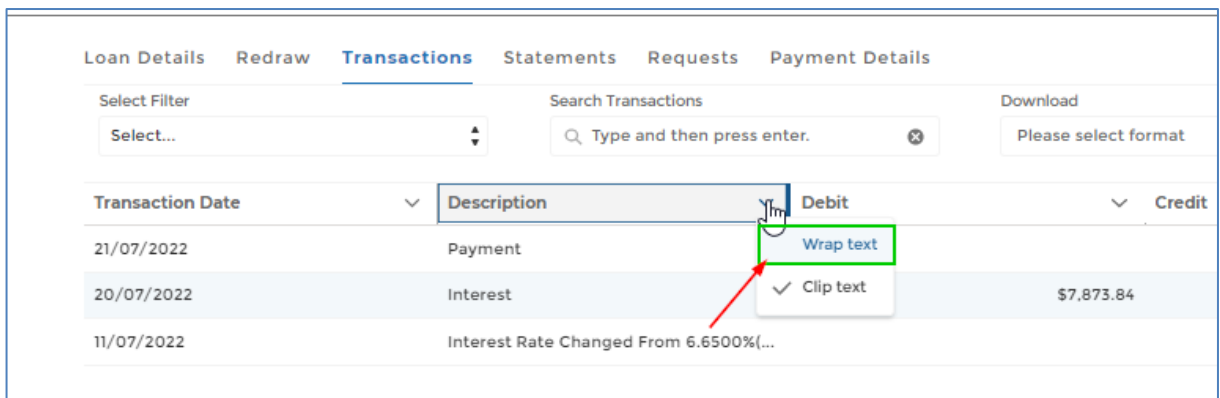


3. On the Transactions tab, you can select from several views:

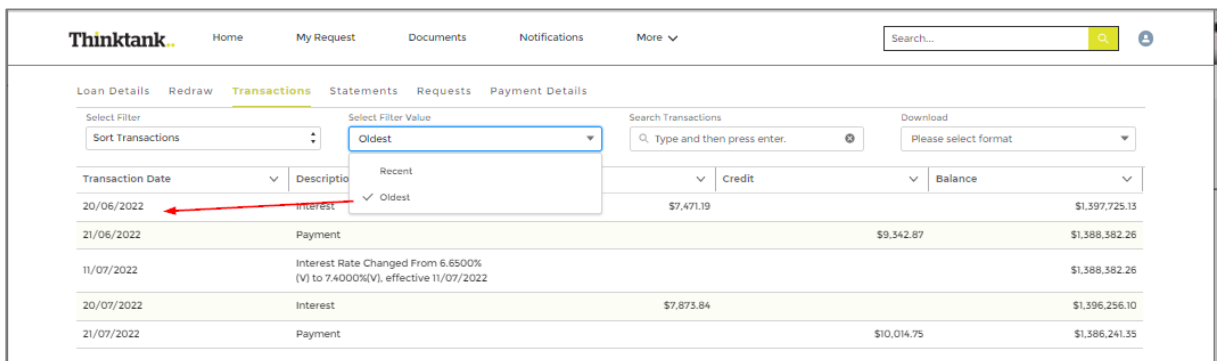
By default, the display will show Transactions for the last 6 months. You can change or expand the range by choosing from various options:



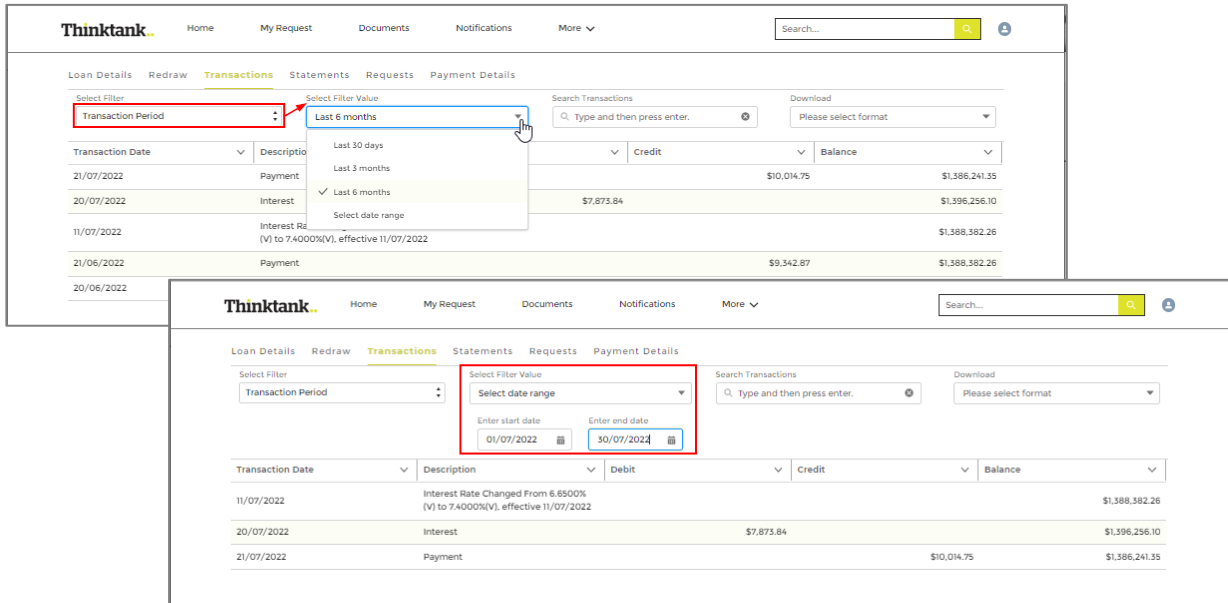
If you find the Description is larger than the width of the column, you can click the arrowhead to open options to **wrap text** (show all the text in multiple lines like the image above) or **clip text** (show only enough to fit one line as below).



4. You can **Sort** according to either most Recent first or Oldest first. This will continue to apply if a date range is now chosen.



- When you filter by Transaction Period you can select the options of 30 days, 3 months, 6 months, or Date Range).



- Once you have created your preferred selection, you can the download to a file to review or upload to your accounting software.

