

MEMBERDIRECT® Steps To Download & Upload Files For Accounting Software

1

Log in to your account through Online Banking

2

Go to the account you want uploaded to your accounting software

3

Select a date range
Select ADVANCED OPTIONS

4

Select the type of transaction you would like to appear

5

Under the FORMAT DROP DOWN MENU, select Download to _____ (your software)

6

Click SEARCH, review the warning and continue, a pop up will appear

7

Save the file under preferred name, location and format

8

Open your Accounting Software, Upload the file from the saved location on your computer.

9

Your transactions should now appear in your software.