



How to...

View accounts, balances
and transaction history.

SBS Internet banking guides.



Step 1. ▶ View your accounts.

home accounts ▾ move money ▾ multi-payments ▾ estimations ▾ secure message ▾

view our other products ▾

account manager

Mrs Sample Name
123456

Transactional 03-1234-1234567-00	current balance \$50	
i-Save 03-1234-1234567-01	current balance \$3,037.36	available funds \$3,037.36
HOLIDAY ACCOUNT 03-1234-1234567-03	current balance \$161.01	available funds \$161.01

I want to...
view details
view transaction history
view statement
change account alias

▶ The **home** screen shows your accounts and balances.

▶ To view transaction history, click on the **account** that you wish to view.

For more options click on the three **orange dots** to open the

Step 2. ► View transaction history.

Basic search

transaction list

select account

transactional: 03 1234-0123456-00 available: \$500.72

current balance: \$500.72 available balance: \$500.72

account information

search transactions

basic search advanced search

date range

the last week

The last week

The last fortnight

The last month

The last 3 months

The last 6 months

The last year

transaction type

all transactions

		debit/credit	balance
23/09/2020	plumbing - 01-0234-0123456-00	-\$100.00	\$500.72
23/09/2020	payment/transfer transfer from: 01-0234-0123456-00	-\$600.00	\$600.72

Click on the arrow in the drop-down box to **select the account** you want to view.

Select the **date range** and **transaction type** you want to view by clicking on the drop-down menus.

If you are looking for something specific select **advanced search**.

Advanced Search.

If you are looking for something specific you can choose **advanced search**. Here you can search by transaction type, payee name, payment reference, withdrawals, deposits or a specific date range.

search transactions

basic search **advanced search**

transaction type all transactions	debit/credit all
start date 01/01/2020	end date 23/09/2020
format: dd/mm/yyyy	format: dd/mm/yyyy
transaction type (\$\$.cc)	debit/credit (\$\$.cc)
search for text insurance	

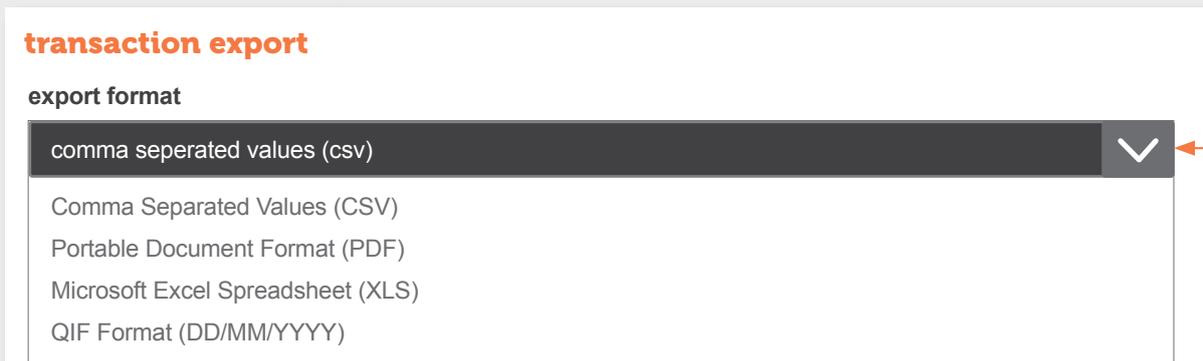
SEARCH RESET

completed transactions

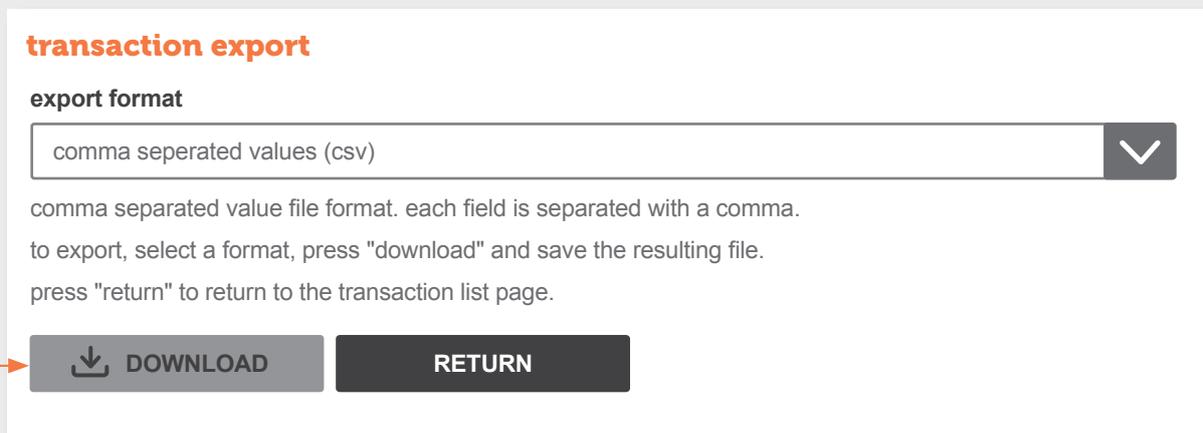
date	transaction type	description	debit/credit
14/02/2020	payment/transfer	<u>transfer from: 03-1234-0123456-00</u> <u>carinsurance</u>	\$15.00
07/02/2020	payment/transfer	<u>transfer from: 03-1234-0123456-00</u> <u>carinsurance</u>	\$15.00
31/01/2020	payment/transfer	<u>transfer from: 03-1234-0123456-00</u> <u>carinsurance</u>	\$15.00

Step 3. ▶ Downloading transactions.

If you want to download the transactions, select **EXPORT VIEWED** or **EXPORT ALL**.



Choose the format that you want to download the transactions in by clicking on the drop-down menu.



Select **DOWNLOAD**.

The file should appear at the bottom of the screen. From here you can open the file. You will need to have Adobe Acrobat Reader to view the download.



Check out our full range of 'How to' guides:

[Log in and set up your password](#)

[View accounts, balances and transaction history](#)

[Add a new payee](#)

[Make a payment](#)

[Set up multi-payments](#)

[View and download statements](#)

[Authorise transactions for multiple signatories](#)

You can also follow our 'How to' online videos by visiting our website sbsbank.co.nz/how-to-guides

If you prefer to chat with our friendly team you can give us a call on **0800 727 2265** and we can talk you through it step-by-step.

