



COMMERCIAL ADVANTAGE

eStatements – How to Search and Download

Quick Reference Guide

Published 11/02/2023

Member FDIC



Learn more about eStatements and ACH Activity Reports in Commercial Advantage.

Table of Contents

Overview.....	3
eStatements Search.....	3
View ACH Activity Report in Commercial Advantage.....	5
Questions?	6

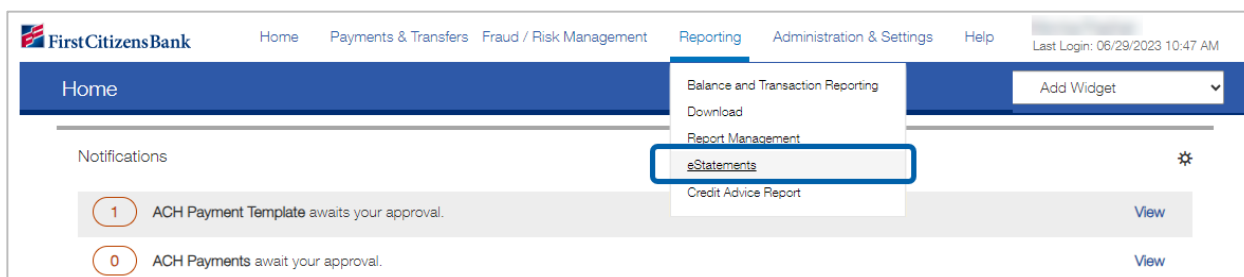
Overview

The eStatements Search feature lets the user find specific eStatements based on the statement type. This feature allows the user to search and download one or more eStatements.

Note: Statement history in Commercial Advantage is limited to 13 months. If additional Statements are needed, please call Customer Service at 888.984.7692.

eStatements Search

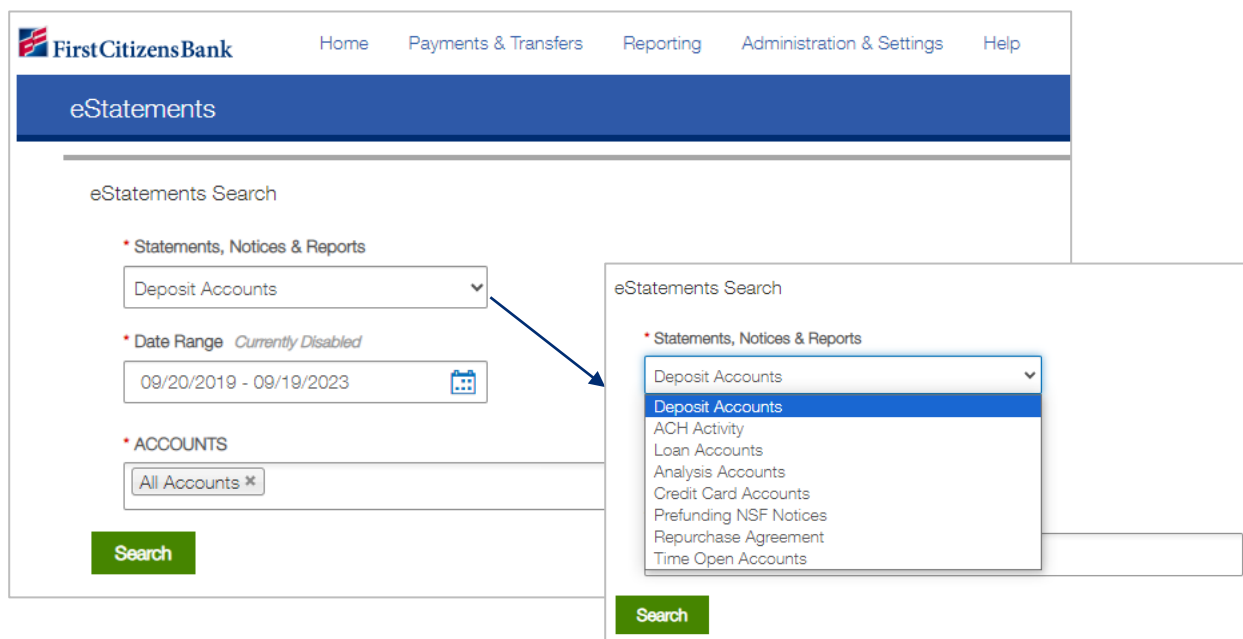
1. From the home page, select **eStatements** from the **Reporting** menu.



2. The **eStatements Search** screen will display as below. Select the appropriate statement type and account(s).

Notes:

- The Date Range feature is currently disabled. The user does not need to make a selection.
- Your drop-down options for **Statements, Notices & Reports** may vary.



- The eStatements list will display as below. To download a statement, select the desired item from the list, then select **Download** in the **Actions** column.

Filter

<input type="checkbox"/> All	Actions	Statement Date	Account Number	Client Account Name
<input type="checkbox"/>	Download	04/11/2022	xxxxxx	Claims Account
<input type="checkbox"/>	Download	04/07/2022	xxxxxx	Claims Account
<input type="checkbox"/>	Download	04/06/2022	xxxxxx	Claims Account
<input type="checkbox"/>	Download	04/05/2022	xxxxxx	Claims Account
<input type="checkbox"/>	Download	03/31/2022	xxxxxx	DO NOT USE FOR Xfers TRUST DDA
<input type="checkbox"/>	Download	02/28/2022	xxxxxx	DO NOT USE FOR Xfers TRUST DDA

Viewing 1-10 of 53 records

Display per page < Page of 6 >


- To download multiple eStatements, select the checkboxes to the left of the **Actions** column **OR** check the **All** box to download all listed eStatements. Click the **Download** button.

Filter

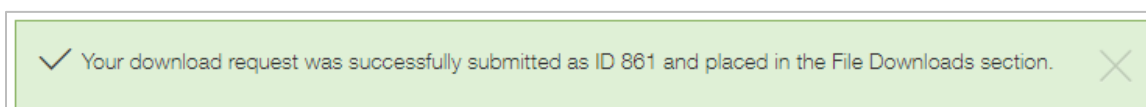
<input checked="" type="checkbox"/> All	Actions	Statement Date	Account Number	Client Account Name
<input checked="" type="checkbox"/>	Download	04/11/2022	xxxxxx	Claims Account
<input checked="" type="checkbox"/>	Download	04/07/2022	xxxxxx	Claims Account
<input checked="" type="checkbox"/>	Download	04/06/2022	xxxxxx	Claims Account
<input checked="" type="checkbox"/>	Download	04/05/2022	xxxxxx	Claims Account
<input checked="" type="checkbox"/>	Download	03/31/2022	xxxxxx	DO NOT USE FOR Xfers TRUST DDA
<input checked="" type="checkbox"/>	Download	03/31/2022	xxxxxx	Claims Account
<input checked="" type="checkbox"/>	Download	03/31/2022	xxxxxx	Demo Account
<input checked="" type="checkbox"/>	Download	03/31/2022	xxxxxx	Regular main Account
<input checked="" type="checkbox"/>	Download	02/28/2022	xxxxxx	DO NOT USE FOR Xfers TRUST DDA
<input checked="" type="checkbox"/>	Download	02/28/2022	xxxxxx	DO NOT USE FOR Xfers TRUST DDA

Viewing 1-10 of 53 records

Display per page < Page of 6 >

[Download](#) 

- A successful message appears in the eStatements Search widget.



- The file appears in the Download widget at the bottom of the eStatements workspace. Locate the downloaded file in the list, click the **View** drop-down menu in the **Actions** column, and then click **Download**.

Download

[Export](#)

Filter:

All Items [Filters](#)

Actions	Export ID	Export Type	File Name	File Size	Submission Time	Completion Time	Status	Message	Export Message
<div>View</div> <div>Download</div>	861	ESTATEMENT Export	DEPOSITSTMTStatement04192022_063640.zip	200	04/19/2022 01:36:40	04/19/2022 01:36:50	Complete		

Viewing 1-1 of 1 records

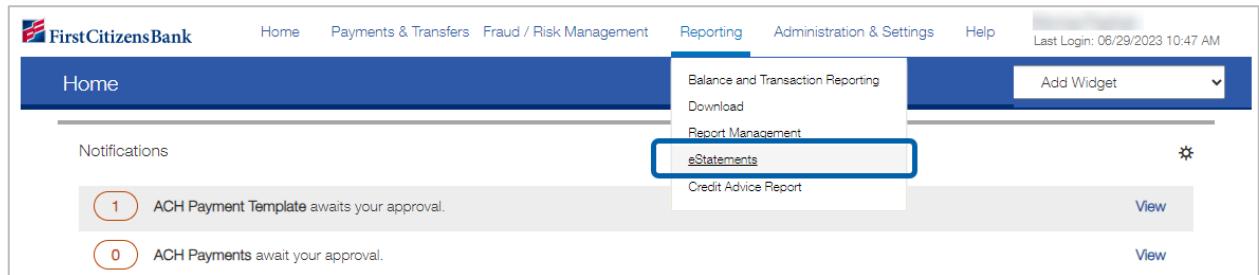
Display 50 per page Page 1 of 1

View ACH Activity Report in Commercial Advantage

ACH return and notification of change details can be found on the ACH Activity Report.

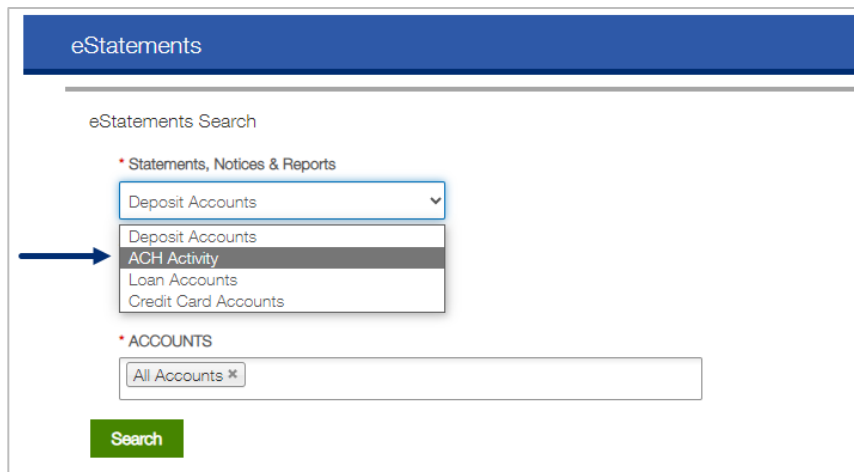
To access the ACH Activity Report, please follow these steps:

1. From the home page, select **eStatements** from the **Reporting** menu.



The screenshot shows the First Citizens Bank home page. The top navigation bar includes links for Home, Payments & Transfers, Fraud / Risk Management, Reporting, Administration & Settings, and Help. The 'Reporting' menu is open, showing options: Balance and Transaction Reporting, Download, Report Management, **eStatements** (highlighted with a blue box), and Credit Advice Report. Below the navigation bar, there are notifications: '1 ACH Payment Template awaits your approval.' and '0 ACH Payments await your approval.'.

2. Choose **ACH Activity** as the statement type. Select the appropriate date range and account number.



The screenshot shows the 'eStatements' search form. It has a section for 'eStatements Search' with a dropdown menu for 'Statements, Notices & Reports'. The dropdown is open, showing options: Deposit Accounts, **ACH Activity** (highlighted with a blue box and an arrow), Loan Accounts, and Credit Card Accounts. Below this is a section for 'ACCOUNTS' with a text input field containing 'All Accounts *'. At the bottom is a green 'Search' button.


3. Select **Search**.

eStatements Search

* Statements, Notices & Reports

ACH Activity ▼

* Date Range *Currently Disabled*

09/21/2019 - 09/20/2023 

* ACCOUNTS

All Accounts ✖

Search ←

Questions?

We're here to help. Contact Business Support with questions at 866-322-4249 (866-FCB-4BIZ). Our team is happy to assist you.