

# How to View Loan Activity



1 Navigate to Money Movement > Loans.

The screenshot shows the CHOICE BANK web interface. The top navigation bar includes links for Welcome, Reports, Money Movement, Account Services, and Administration. A star icon is visible next to the CHOICE BANK logo. The 'Money Movement' menu is open, showing options: Scheduled Requests, Transfer Money, Loans (highlighted with an orange circle), Bill Pay, ACH, and Wire. The 'Loans' option is the target for this step.

**Accounts Summary**

Checking Savings CertificateOfDeposit

Balances as of 02/13/2025

	Available Balance
ABC Company LLC MM Savings ABA/TRC 2968	\$6.01
ABC LLC Business Checking ABA/TRC 6701	\$1.27
CB Test Inc ABA/TRC 1212	\$0.00
Jack Customer Business Account ABA/TRC 7903	\$90.08
<b>Total Selected Checking Balance</b>	\$0.00
<b>Total of Selected Deposit Accounts</b>	\$0.00

Display Options Balances

Exception Decisions

All decisions My decisions

Alerts and Mes

Password Change  
02/07/2025 11:57:32 AM

Password Change  
02/06/2025 01:10:08 PM

Password Change  
02/06/2025 01:08:49 PM

Saved Reports

Intraday Report

Previous Business

Cash Mi Res  
User Guide  
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Tips, New  
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Me

2 Select the drop-down arrow on the left side of the loan.

CHOICE BANK

Welcome Reports Money Movement Account Services Administration

Hi, Cally | SignOff  
Last Login: Feb 13, 2025, 10:52:04 AM ET

Approvals

### Loans

Manage Loans Balances

Current as of: 02/13/2025 12:00:00 AM (ET)

Show All Notes (To view up-to-date details, click on the Note ID or Commitment ID.)

Description	Account Number/Note ID	ABA/TRC	Original Balance	Current Balance	Commitment ID
> Jack Customer Line of Credit	*1212	091302966			
> Loan XXX1212	*1212	091302966			

Items per page: 5 1 - 2 of 2 |< >|

3 Click the 3 dots on the right side.

CHOICE BANK

Welcome Reports Money Movement Account Services Administration

Hi, Cally | SignOff  
Last Login: Feb 13, 2025, 10:52:04 AM ET

Approvals Exceptions

### Loans

Manage Loans Balances

Current as of: 02/13/2025 12:00:00 AM (ET)

Show All Notes (To view up-to-date details, click on the Note ID or Commitment ID.)

Description	Account Number/Note ID	ABA/TRC	Original Balance	Current Balance	Commitment ID
Jack Customer Line of Credit	*1212	091302966			
			\$100.00	\$36.17	
Loan XXX1212	*1212	091302966			

Items per page: 5 1 - 2 of 2 |< >|

#### 4 Click "Loan Activity - Report"

is Balances

02/13/2025 12:00:00 AM (ET)

Notes (To view up-to-date details, click on the Note ID or Commitment ID.)

Transaction	Account Number/Note ID	ABA/TRC	Original Balance	Current Balance	Commitment ID
Customer Line of Credit	*1212	091302966	\$100.00	\$36.17	...
XX1212	*1212	091302966			

Items per page: 5 1 - 2

- Make Payment
- Request Advance
- Payment and Advance History
- Loan Summary - Notes
- Loan Activity - Report

[Privacy](#) Questions? We can help! +

#### 5 You can click "Edit Date Range" to view history.

★

✓ Approvals

### Loans

Manage Loans Balances

< Back Loan Activity

Report Created: 02/13/2025 03:09:10 PM (ET)  
Current as of: 02/13/2025  
Loan Account: 091302966 • \*1212 • Jack Customer Line of Credit  
Note ID:   
Transaction Date Range: 11/14/2024 to 02/12/2025 [Edit Date Range](#)

(To view a breakdown of associated charges, click on the Other Charges amount.)

Transaction Type	Transaction Effective Date	Amount	Allocated To Principal	Allocated To Interest	Other Charges	Cur
Regular Payment	01/24/2025	\$25.00	\$25.00	\$0.00	<u>\$0.00</u>	

6

Choose the date range you want to view and click save.

**BANK** Welcome Reports Money Movement Account Services Administration Last Login: Feb 13, 2025, 10:52:04 AM ET

Approvals Exceptions

Balances

**Edit Report Date Range**

Date

☐ Specific Date

☒ Date Range

From  
11/14/2024

To  
02/12/2025

☐ Previous Business Day

☐ Do not limit by date range

Save Cancel

Transaction Effective Date	To Interest	Other Charges	Current Balance
01/24/2025	\$0.00	\$0.00	\$36.17