

# Online Banking User Guide



## Account Access

### First Time Login

Enter the 12-digit ID and password assigned by the bank and click **Submit**.

|   |                          |
|---|--------------------------|
| ID:   | <input type="text"/>     |
| Password:   | <input type="password"/> |
| <input type="button" value="Submit"/> <input type="button" value="Cancel"/> |                          |

\*you will be prompted to change your password the first time you log in.



## Viewing Transactions

Select **Transactions** from the drop-down menu next to an account.

| Account Name                | Balance:   | Status: | Quick Link Options:               |
|-----------------------------|------------|---------|-----------------------------------|
| <a href="#">My Checking</a> | \$345.96   | Open    | <a href="#">View Transactions</a> |
| <a href="#">My Savings</a>  | \$2,908.33 | Open    | Select Option                     |

Transaction History is available for 90 days.

| View Transactions for: My Checking |               |             |          | View Range: | Since Last Statement | 7 Days | 15 Days | 30 Days |
|------------------------------------|---------------|-------------|----------|-------------|----------------------|--------|---------|---------|
| Date                               | Ref/Check No. | Description | Debit    | Credit      | Balance              |        |         |         |
| 05/30/2007                         | 5689487       | Payroll     |          | \$2,165.36  | \$4,669.74           |        |         |         |
| 05/30/2007                         | 5656          | Check 5656  | \$125.00 |             | \$2,504.38           |        |         |         |

### Transaction List Options:

- ✓ Choose Number of Transactions Displayed
  - ✓ View Check Images
- ✓ Sort Columns to Customize View
- ✓ Switch Between Accounts

## Transaction Search

Select **Search** from the Transaction sub-menu to search transactions by date, dollar amount, credit, debit, or check number.

| Accounts             | Transactions          | Transfers              | Stop Payments |
|----------------------|-----------------------|------------------------|---------------|
| Current Transactions | Download Transactions | <a href="#">Search</a> |               |



## Transferring Funds

Select **Transfers** from the drop-down menu next to an account.

| Account Name                | Balance:   | Status: | Quick Link Options:            |
|-----------------------------|------------|---------|--------------------------------|
| <a href="#">My Checking</a> | \$345.96   | Open    | <a href="#">Transfer Funds</a> |
| <a href="#">My Savings</a>  | \$2,908.33 | Open    | Select Option                  |

Select the **From** and **To** accounts from the drop-down menus. Enter the Transfer Amount, Frequency, and Date of the Transfer. Click **Submit** to complete the transfer.

| Transfer Funds                        | Schedule             | Review | Finish |
|---------------------------------------|----------------------|--------|--------|
| * Transfer funds from:                | Select From Account  |        |        |
| * Transfer funds to:                  | Select To Account    |        |        |
| * Transfer amount:                    | <input type="text"/> |        |        |
| * Frequency:                          | Select Frequency     |        |        |
| Transfer date:                        | 10/05/2007           |        |        |
| Transfer memo:                        | <input type="text"/> |        |        |
| <input type="button" value="Submit"/> |                      |        |        |

## Pending and Completed Transfers

Select **Pending Transfers** to view, edit, or delete a scheduled transfer.

**Transfer History** lists completed transfers.

Transfer history is available for 90 days.

| Accounts     | Transactions | Transfers                         | Stop Payments                    | Statements |
|--------------|--------------|-----------------------------------|----------------------------------|------------|
| New Transfer |              | <a href="#">Pending Transfers</a> | <a href="#">Transfer History</a> |            |



## Viewing Statements

Select **Statements** from the drop-down menu next to an account.

| Account Name                | Balance:   | Status: | Quick Link Options:        |
|-----------------------------|------------|---------|----------------------------|
| <a href="#">My Checking</a> | \$345.96   | Open    | <a href="#">Statements</a> |
| <a href="#">My Savings</a>  | \$2,908.33 | Open    | Select Option              |

Statements are available in PDF, HTML, and Text formats.

Statement history is available for 180 days.

| Statement Date: | Description:           | Select Format to View: |
|-----------------|------------------------|------------------------|
| 08/20/2007      | This is your statement | Select option...       |
| 08/17/2007      | This is your statement | Select option...       |



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## Stop Payments

Select **Stop Payments** from the drop-down menu next to an account.

| Account Name | Balance: | Status: | Quick Link Options: |
|--------------|----------|---------|---------------------|
| My Checking  | \$345.96 | Open    | Stop Payments       |

Fill in the required fields and click **Submit**.

**New Stop Payment** Enter Review Finish

NOTE: \* Required field

Add Stop Payment for Account: My Checking

Check Date:

\* Start Check Number:

\* Begin Amount: \$

\* Payee:

Remarks:

You must contact the bank to edit or remove a Stop Payment.

Stop Payment fees will be automatically deducted from your account in accordance with the terms of your account.



## Transaction Download

Select **Download** from the drop-down menu next to an account.

| Account Name | Balance:   | Status: | Quick Link Options: |
|--------------|------------|---------|---------------------|
| My Checking  | \$345.96   | Open    | Download            |
| My Savings   | \$2,908.33 | Open    | Select Option       |

Choose the **Download Range** and **Format** and click **Submit**.

**Download Transaction**

NOTE: \* Required field

Download Transactions for Account: My Checking

\* Select Download Range:

\* Select Download Format:



## Options

- ✓ Change **Personal, Account, and Display** Settings.
- ✓ Set up **Alerts**.

| Accounts | Options | Display | Alerts |
|----------|---------|---------|--------|
| Personal | Account | Display | Alerts |

### Personal

- ✓ Update ID\*  
\*create an ID to use instead of 12-digit ID
- ✓ Change Password
- ✓ Create password self-reset Question & Answer

### Account

- ✓ Change Account Pseudo Names (nicknames).
- ✓ Edit order in which accounts are displayed.

### Display

- ✓ Edit Number of Accounts displayed per page.
- ✓ Edit no. of transactions displayed by default.

### Alerts

#### Event Alerts

- ✓ Incoming Direct Deposits
- ✓ Funds Transfer Information
- ✓ Statement Notifications

#### Balance Alerts

- ✓ Notification of Account Balances

#### Item Alerts

- ✓ Notification of Cleared Checks

#### Personal Alerts

- ✓ Text-based alerts delivered on chosen date.



## Security

One of the first times you access your accounts online, we'll ask you to choose and answer three (3) **Personal Verification Questions**.

During future online sessions, we'll ask you some of these questions if we feel there is a possibility that someone other than you is attempting to access your information.

Please choose answers that you will remember. Incorrectly answering questions can lead to your account access being disabled.

You will be asked to change your password every 180 days.

### Security Reminders

- ✓ We will NEVER email you for your personal information. Any email claiming to be the bank requesting personal information such as Social Security Numbers, IDs, or Passwords should not be trusted or opened.
- ✓ Do not write your password down.
- ✓ Use a different password to access your online accounts than ones you use for other applications.
- ✓ Always exit your online banking session before leaving your computer.



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