Accounts

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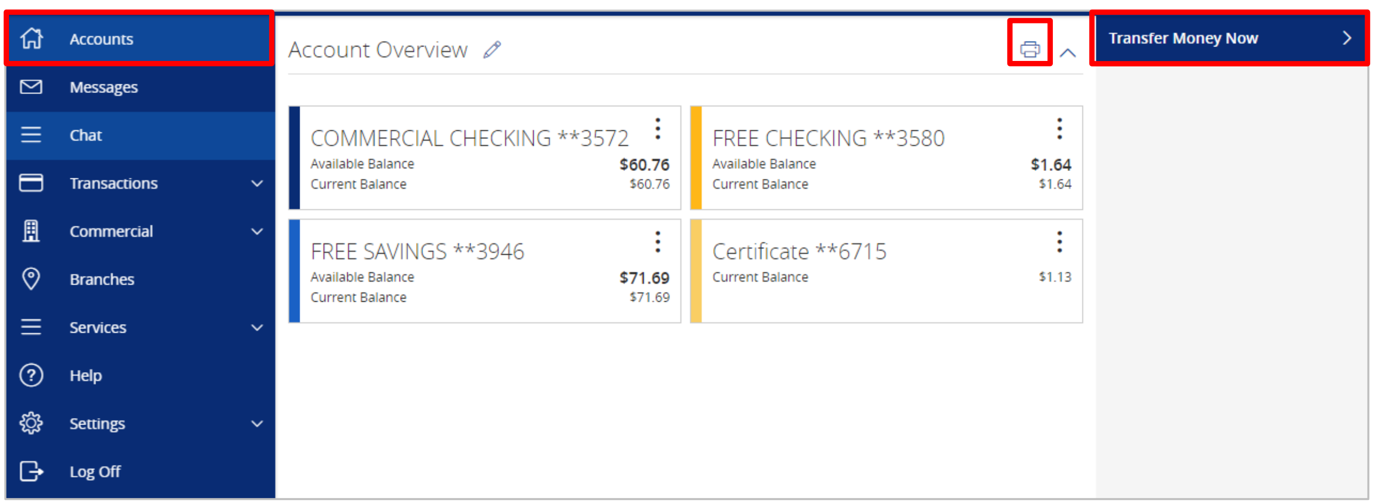
1. A listing of accounts the user has access to appear in the middle of the screen.
2. The ‘Transfer Money Now’ option on the top right corner of the screen is a direct shortcut to the ‘Transfer Funds’ option within the ‘Transactions’ menu.
3. Click on the icon next to the Group Name to rename accounts group.

   NOTE: See below under Account Grouping to learn how to create groups.

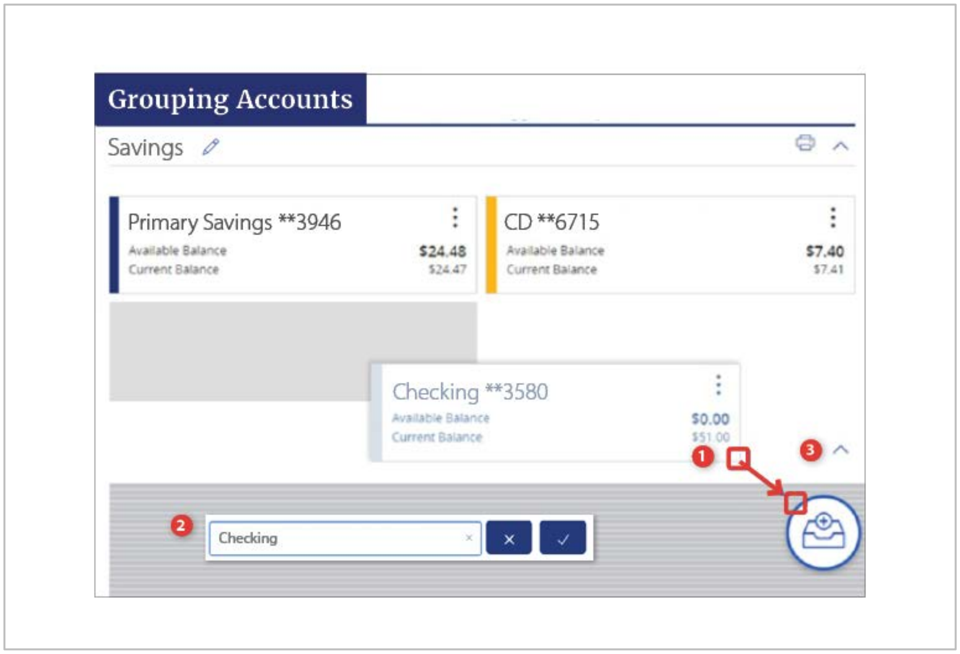
4. Click the icon shown above the account listing towards the right side of the screen to print a listing of accounts.
5. Click on any account to go to the ‘Account Details’ page to view account details and transaction history associated with the account.



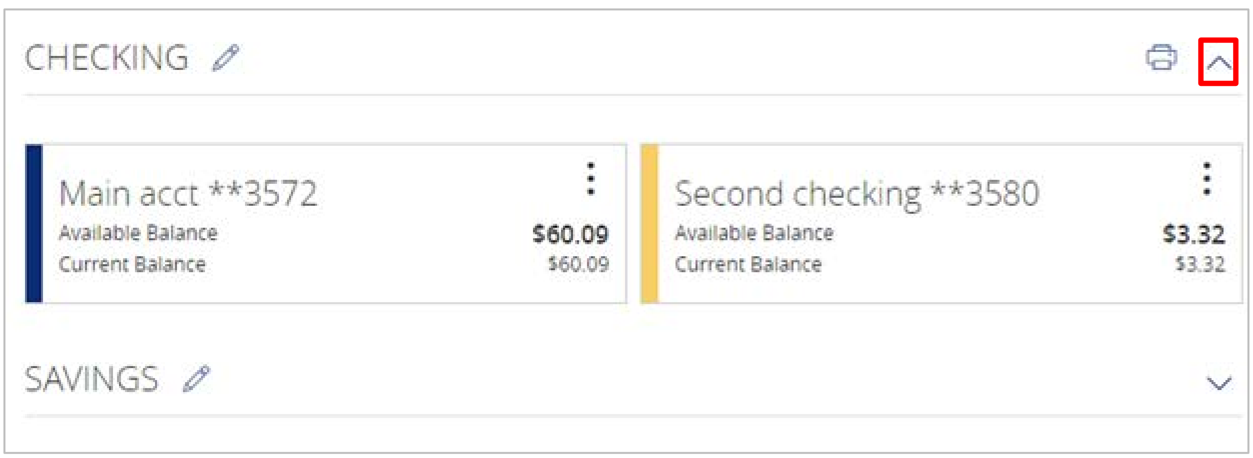
Account Grouping

1. Click and drag the selected account to the tray icon that appears on your screen.

2. You will then be prompted to name your group.



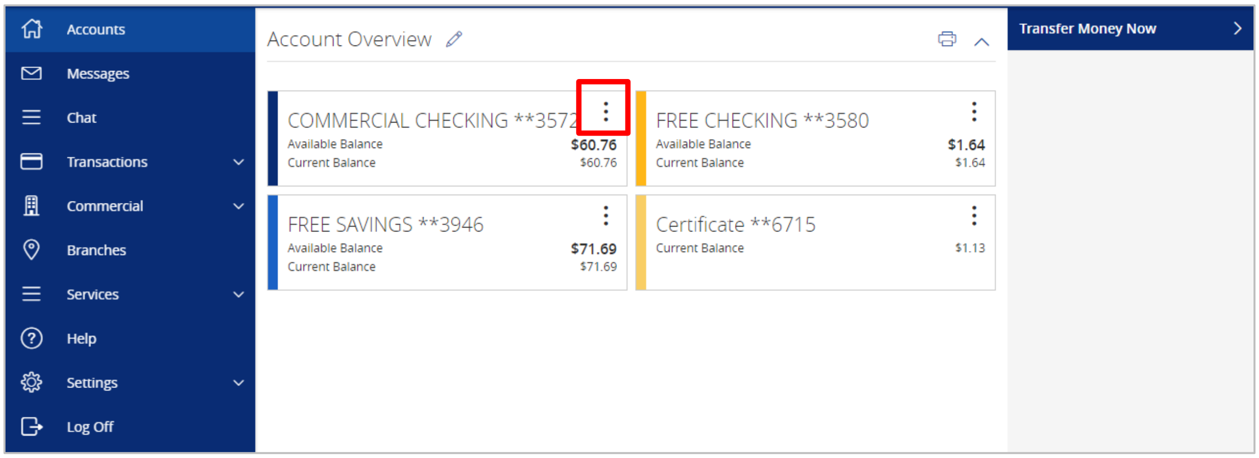
3. To only view selected accounts within a group, click the ^ to collapse the group.



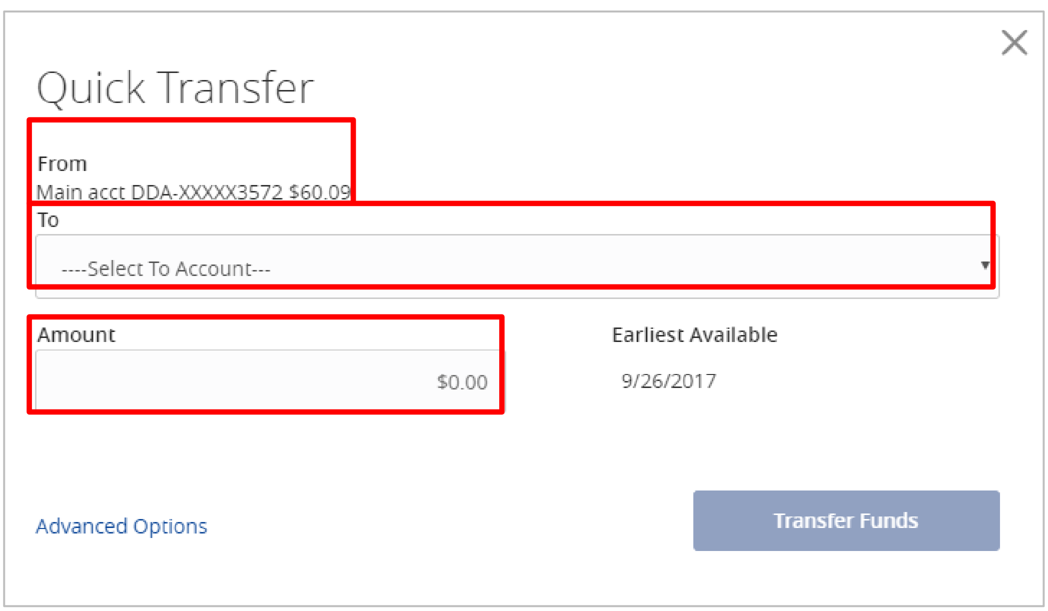
Account Details & Transaction History

Account Details & Transaction History

1. A listing of the details associated with the account can be found listed by clicking the vertical ellipsis to view history and quick transfer feature.

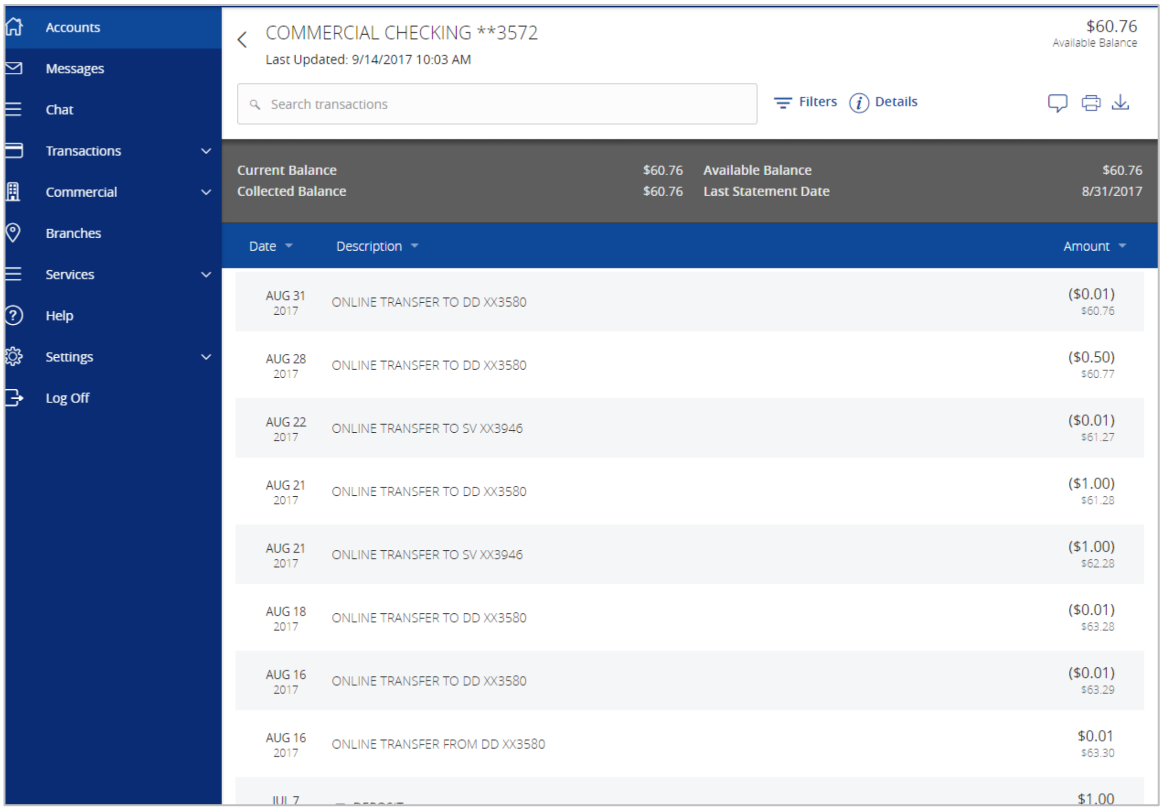


2. To initiate a quick transfer, input the proper 'From' and 'To' accounts and proper 'Amount.'

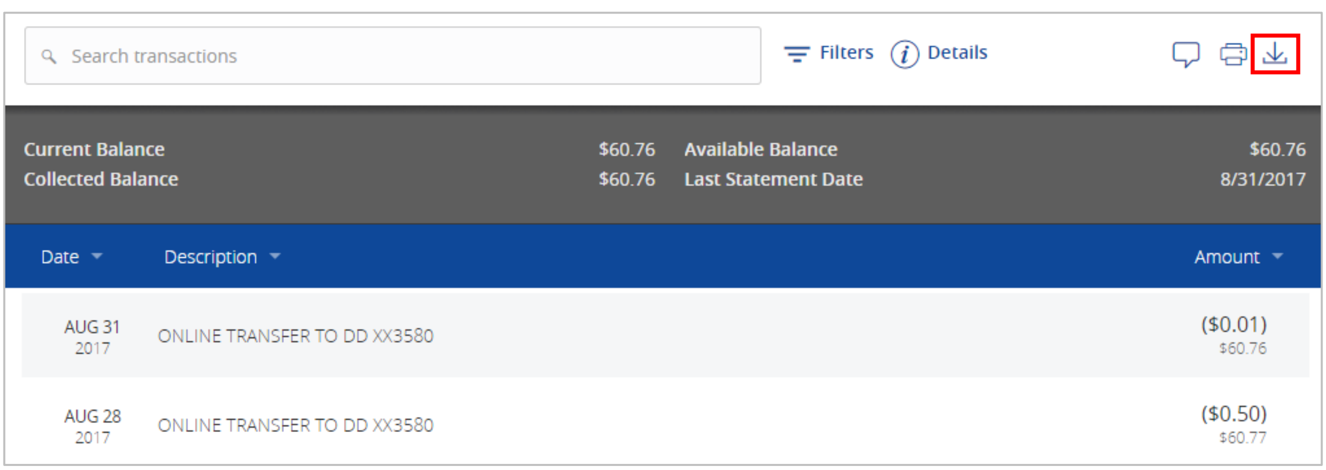


3. A listing of historical transactions associated with the account are listed below the gray box. The newest transaction will appear on top by default.

   NOTE: Transactions performed the same day which are waiting to post to the account will appear as ‘Pending’ in red type. All historical transactions will display the date the transaction posted to the account.

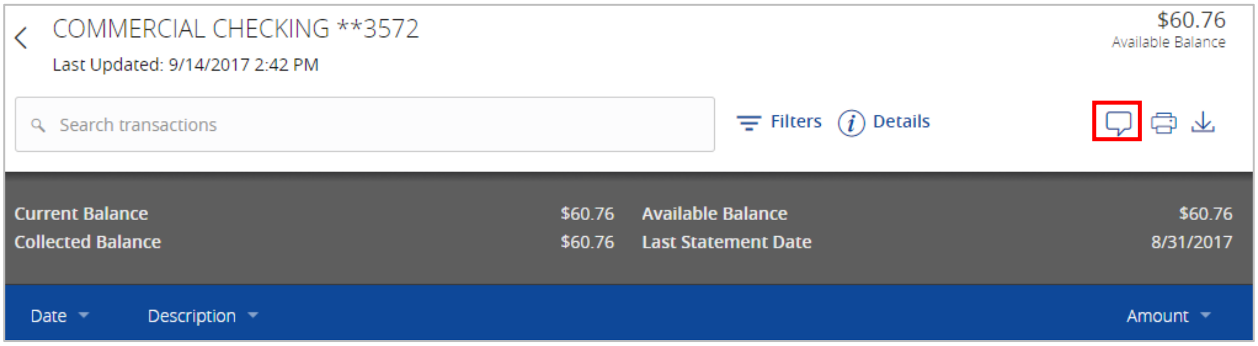


4. Click on the ‘Export’ button on the right side of the screen to display a listing of available formats. The export will include all transactions specified in the filter by the user.



Account Conversations Inquiry

1. Click on the ‘Message Icon’ in the top right hand corner of the page to initiate a secure message.



2. All account details will be automatically filled in. Type the inquiry in the ‘Message’ box and click the ‘Send’ button.

NOTE: Click on the ‘Supported Attachments’ link to view a listing of supported file types.

Click on the paper clip icon to attach a file to the Account Inquiry.