

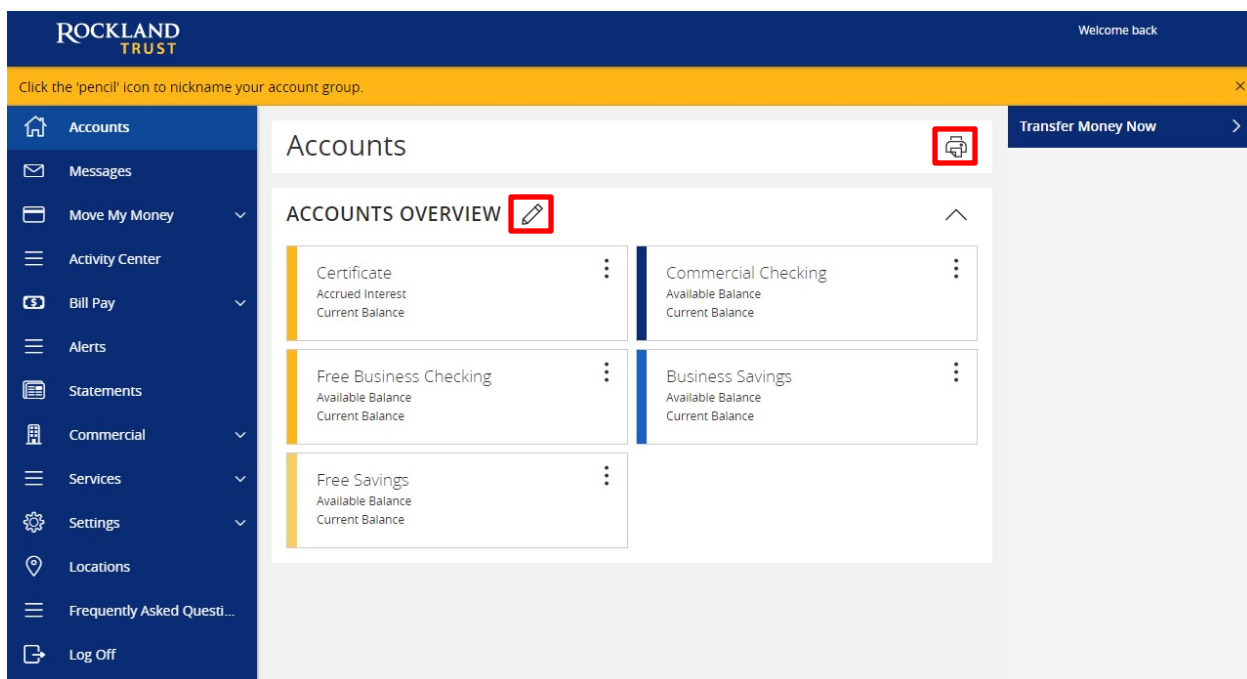


Accounts, Account Details, and Transaction History

Accounts

1. A listing of accounts the user has access to will 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 *Funds Transfer* option within the *Move My Money* menu.
3. Click on the  icon next to the Group Name to rename account 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.



ROCKLAND TRUST

Welcome back

Click the 'pencil' icon to nickname your account group.

Accounts

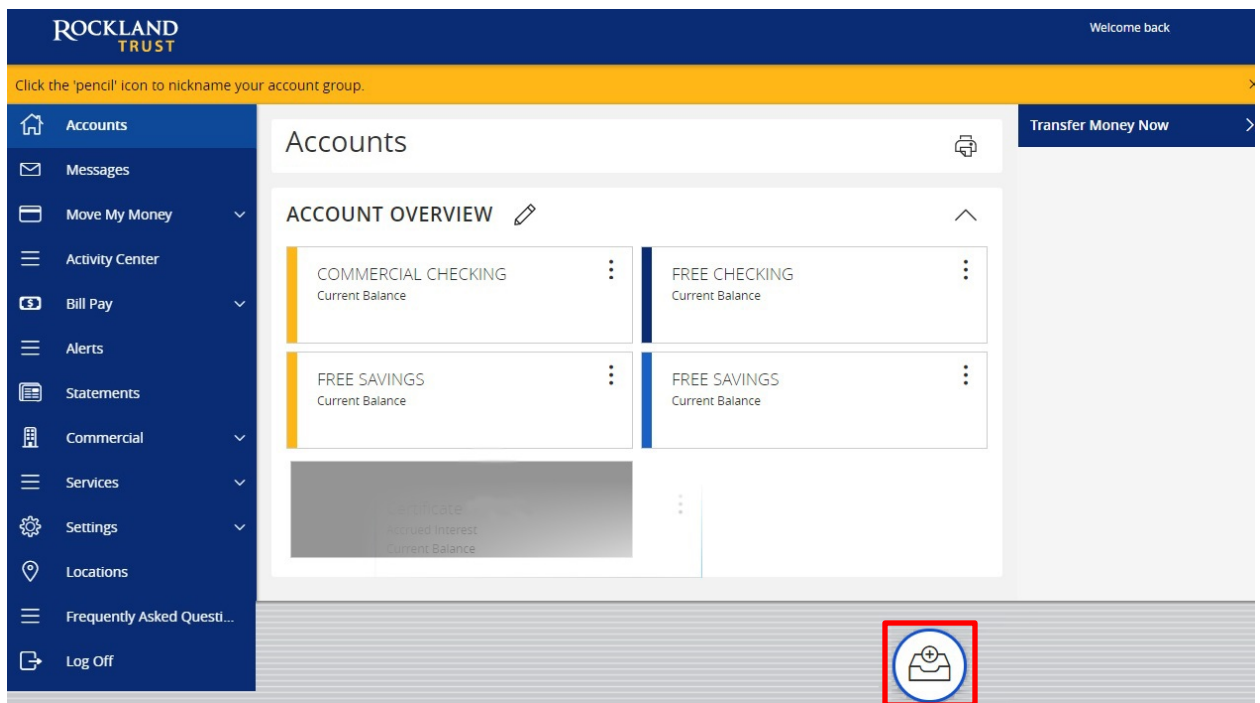
Transfer Money Now

ACCOUNTS OVERVIEW

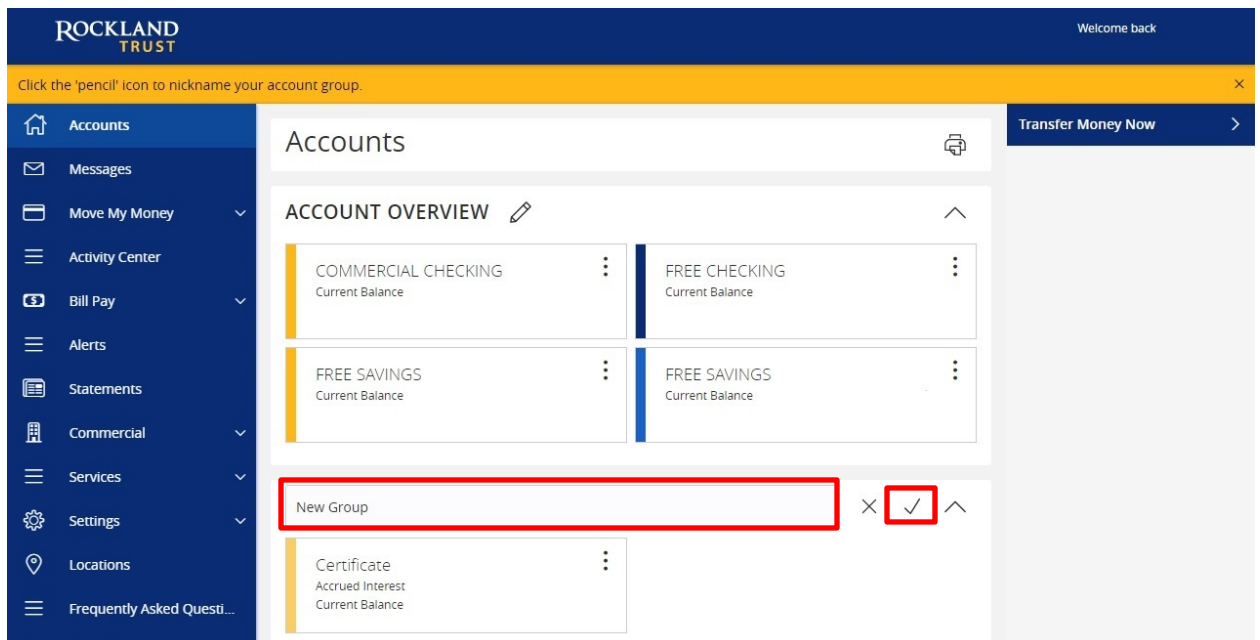
Certificate Accrued Interest Current Balance	Commercial Checking Available Balance Current Balance
Free Business Checking Available Balance Current Balance	Business Savings Available Balance Current Balance
Free Savings Available Balance Current Balance	

Account Grouping

1. Click and drag the selected account to the tray icon that will appear.



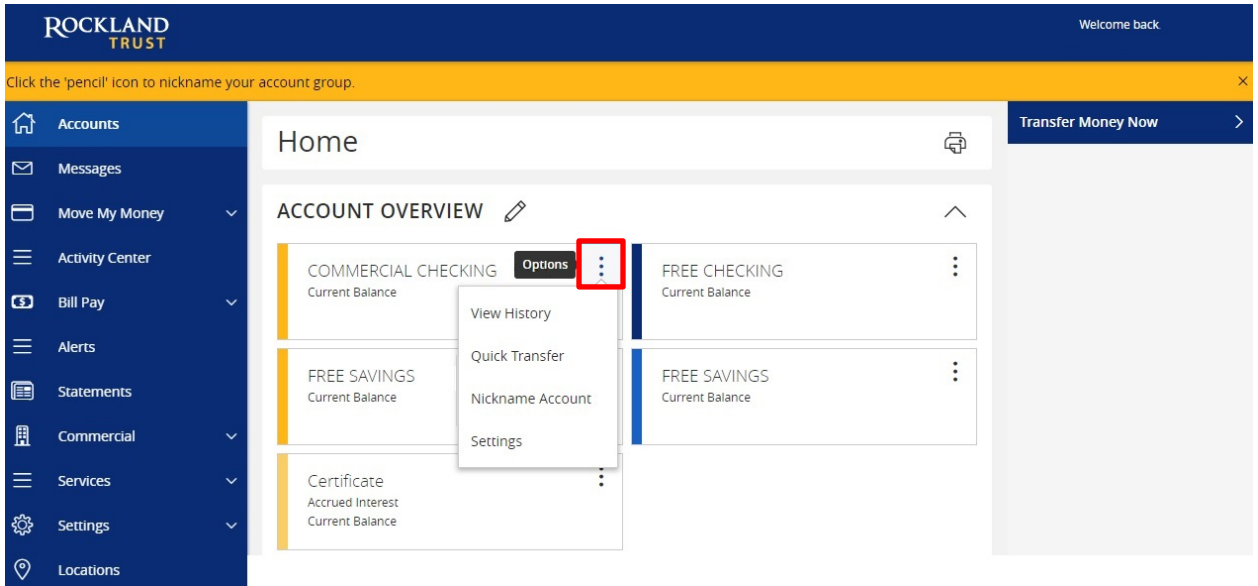
2. You will be prompted to name your group, click the ✓ to confirm the name.



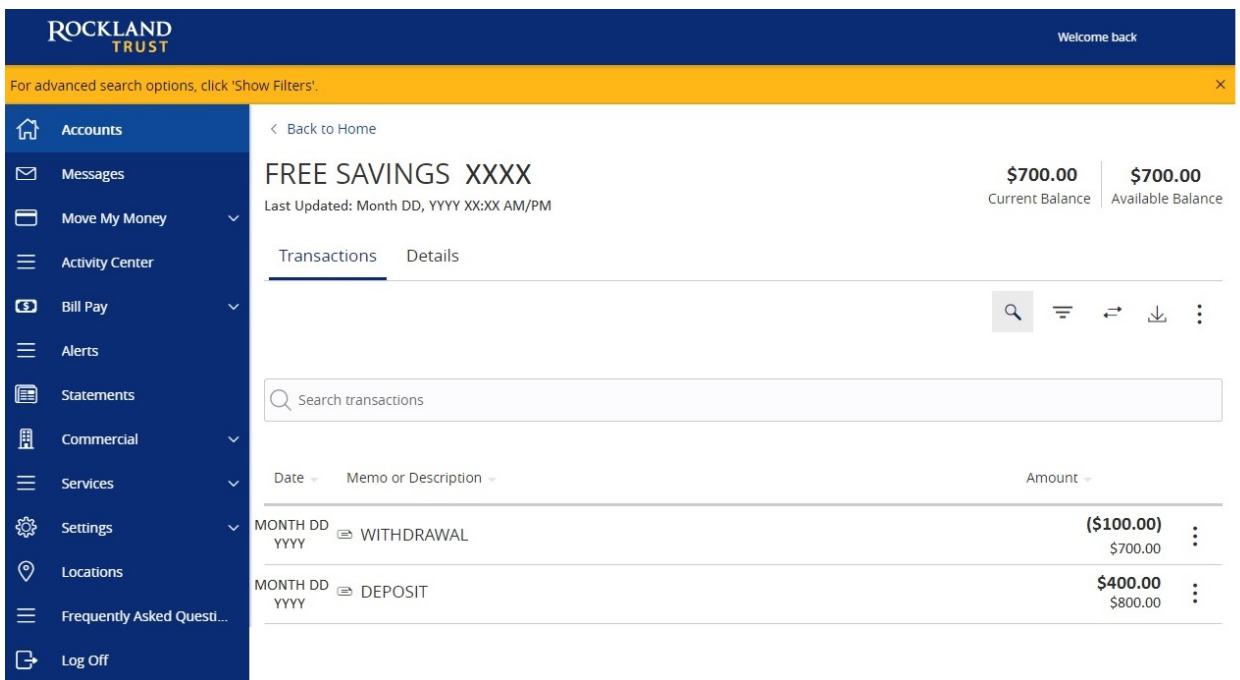
NOTE: Click the ^ to collapse groups and the v to open groups.

Account Details and Transaction History

1. A listing of the details for the account can be found by clicking the three dots. Click “View History”.



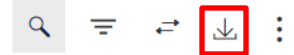
2. A page will appear that will show all transactions associated with the account.



NOTE: Transactions performed the same day as you're viewing your account will appear as *Pending* and will eventually display as the date the transaction posted to the account.

- Click 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.

[Transactions](#) [Details](#)



- Back at the three dots in Step 1, click “Quick Transfer” and input a *From*, *To*, and an *Amount* then click “Transfer Funds”.

Quick Transfer

From Account

COMMERCIAL CHECKING DDA-XXXX

To Account

FREE SAVINGS SAV-XXXX

Amount

\$0.00

Earliest Available

MM/DD/YYYY

[Advanced Options](#)

[Transfer Funds](#)

5. Back at the three dots in Step 1, click “Nickname Account” to change the name of the account. Click “Save” once done.

Nicknames ×

The global nickname changes the account name for all users who don't have their own nickname set for this account. Your personal nickname for this account is only visible to you.

Account Name Certificate	Accrued Interest \$0.00
Account Number CD- XXXXXX1234	Current Balance \$0.00

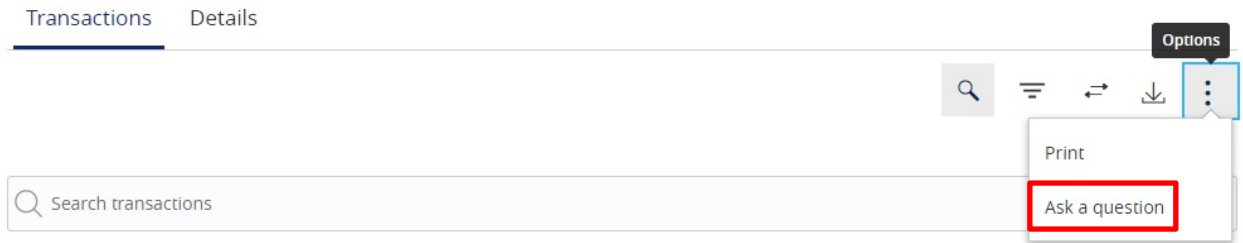
Global Nickname

Personal Nickname

NOTE: *Global Nickname* will allow the administrator to set an account nickname visible to all users. *Personal Nickname* will allow the user to set their own nickname visible only to that user which will overwrite the *Global Nickname* set by the administrator.

Account Conversations Inquiry

1. On the *View History* page, click the three dots and click “Ask a question”.



2. All account details for the account you selected will automatically be filled in. Type your inquiry in the *Message* box, add any supporting documents, and click “Send message”.

Account Inquiry

Subject
Inquiry regarding account: SAV-XXXXX 6789

Message *

Attachments

Inquiry Details

Account Type:	FREE SAVINGS	Description:	FREE SAVINGS
Account:	123456789		



NOTE: Click the “Attach Support Documents” link to bring up your computer’s files. Attach the items that support your *Account Inquiry*.