

# Accounts

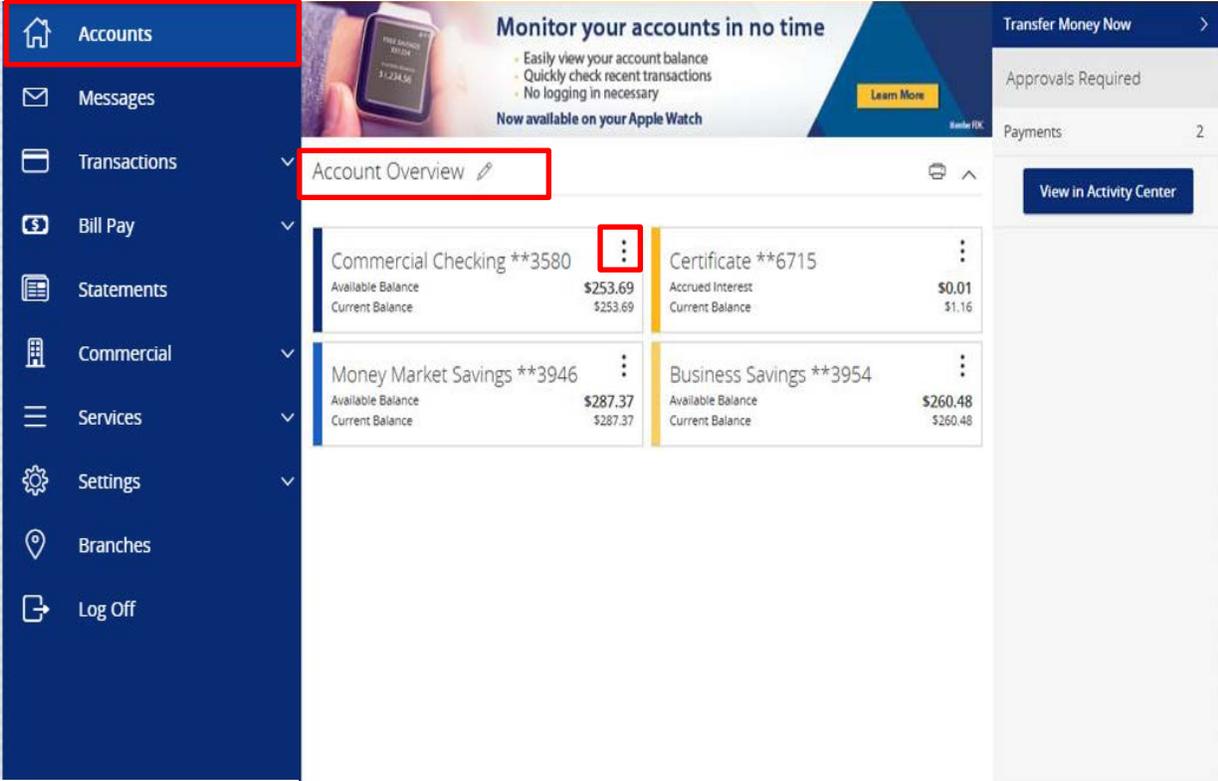
## Accounts

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.



**Monitor your accounts in no time**

- Easily view your account balance
- Quickly check recent transactions
- No logging in necessary

Now available on your Apple Watch

Transfer Money Now >

Approvals Required

Payments: 2

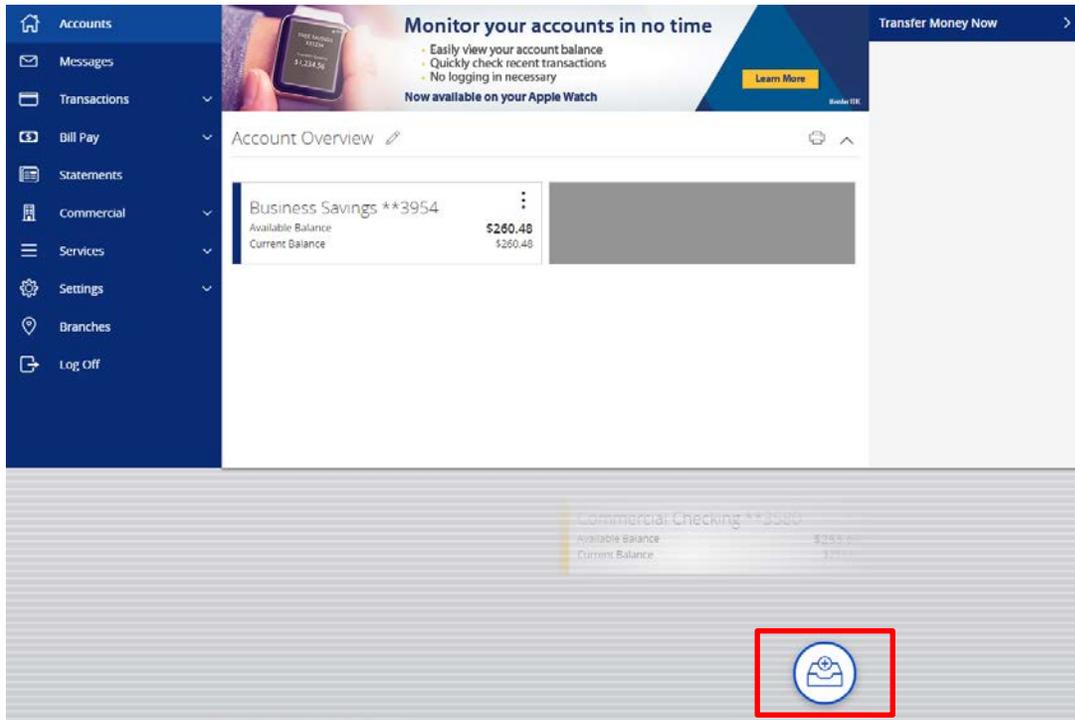
View in Activity Center

Account Overview 

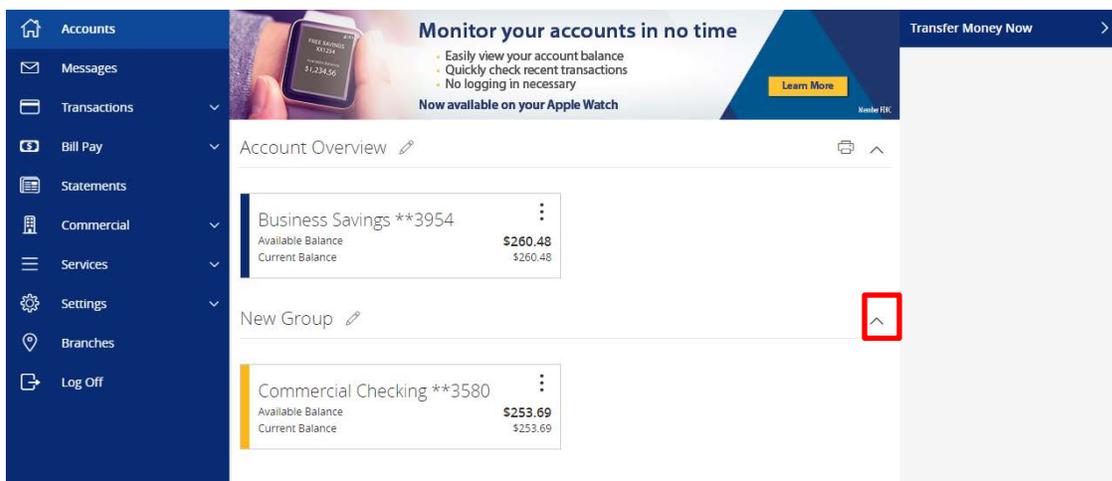
|                             |   |                         |   |
|-----------------------------|---|-------------------------|---|
| Commercial Checking **3580  |  | Certificate **6715      |  |
| Available Balance           | \$253.69  | Accrued Interest        | \$0.01  |
| Current Balance             | \$253.69  | Current Balance         | \$1.16  |
| Money Market Savings **3946 |  | Business Savings **3954 |  |
| Available Balance           | \$287.37  | Available Balance       | \$260.48  |
| Current Balance             | \$287.37  | Current Balance         | \$260.48  |

## 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.



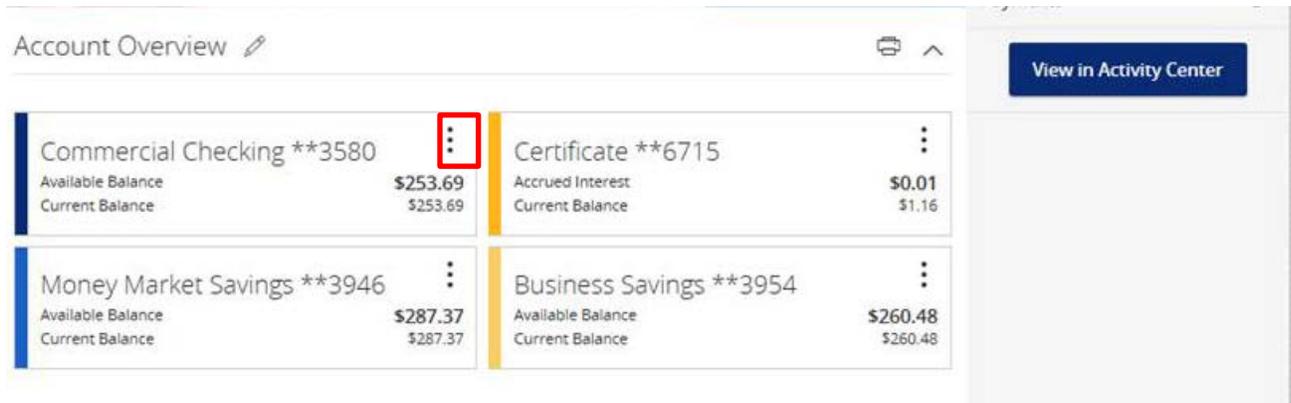
3. To only view selected accounts within a group, click the ^ to collapse the group.



# 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.'

The 'Quick Transfer' form is shown with a close button (X) in the top right. The 'From' field is pre-filled with 'FREE SAVINGS SAV-XXXX3954 \$260.48'. The 'To' field is empty. The 'Amount' field is pre-filled with '\$0.00'. The 'Earliest Available' date is '4/24/2019'. There are 'Advanced Options' and 'Transfer Funds' buttons at the bottom.

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.

The screenshot shows the account details for 'Business Savings \*\*3954' with an available balance of \$260.48. The summary table includes:

|                   |          |                            |           |
|-------------------|----------|----------------------------|-----------|
| Current Balance   | \$260.48 | Interest Paid Last Year    | \$0.00    |
| Collected Balance | \$260.48 | Last Statement Date        | 3/29/2019 |
| Hold Amount       | 0.00     | Interest Paid Current Year | \$0.00    |
| Available Balance | \$260.48 |                            |           |

Below the summary is a list of transactions with columns for Date, Memo or Description, and Amount:

| Date        | Memo or Description              | Amount                |
|-------------|----------------------------------|-----------------------|
| MAR 28 2019 | WITHDRAWAL                       | (\$48.00)<br>\$260.48 |
| MAR 28 2019 | WITHDRAWAL                       | (\$33.00)<br>\$308.48 |
| MAR 28 2019 | WITHDRAWAL                       | (\$24.00)<br>\$341.48 |
| MAR 28 2019 | DEPOSIT                          | \$24.00<br>\$365.48   |
| MAR 28 2019 | DEPOSIT                          | \$33.00<br>\$341.48   |
| MAR 28 2019 | DEPOSIT                          | \$48.00<br>\$308.48   |
| JAN 17 2019 | 4201130 Testing branches for I20 | \$200.00<br>\$260.48  |

Page totals: Credits: [4] \$305.00 | Debits: [3] (\$105.00)

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.

The screenshot shows the account details for 'Business Savings \*\*3954' with an available balance of \$260.48. The summary table includes:

|                   |          |                            |           |
|-------------------|----------|----------------------------|-----------|
| Current Balance   | \$260.48 | Interest Paid Last Year    | \$0.00    |
| Collected Balance | \$260.48 | Last Statement Date        | 3/29/2019 |
| Hold Amount       | 0.00     | Interest Paid Current Year | \$0.00    |
| Available Balance | \$260.48 |                            |           |

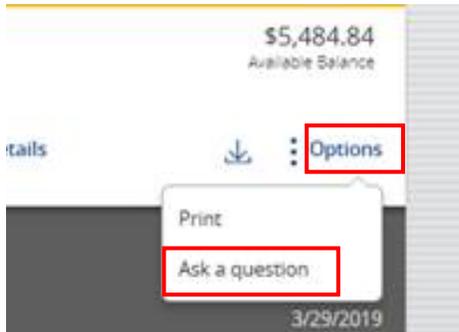
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| MAR 28 2019 | DEPOSIT                          | \$24.00<br>\$365.48   |
| MAR 28 2019 | DEPOSIT                          | \$33.00<br>\$341.48   |
| MAR 28 2019 | DEPOSIT                          | \$48.00<br>\$308.48   |
| JAN 17 2019 | 4201130 Testing branches for I20 | \$200.00<br>\$260.48  |

The 'Export' button (represented by a download icon) is highlighted with a red box.

## Account Conversations Inquiry

1. Click on the 'Options' button in the top right hand corner of the page and select 'Ask a Question' a secure message.



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

### Account Inquiry

Subject

Inquiry regarding account: SAV-XXXX3954

Message \*

Attachments

Attach Support Documents

#### Inquiry Details

**Account Type:**  
**Account:**

FREE SAVINGS  
9783954

**Description:**

FREE SAVINGS

Cancel

Send Message

**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.

Subject  
Inquiry regarding account: DDA-XXXXX8888

 [Supported Attachments](#)

Supported attachment file types: .ach, .ddf, .doc, .docx, .log, .pdf, .ppt, .pptx, .prn, .rtf, .text, .txt, .wpd, .xls, .xlsx

Message \*