Responses for Online Banking Question

***We may see questions similar to the ones listed below, they may not be worded the same but they will be similar.

- **How do I access the online banking?**
  - First make sure they are looking at the website.
  - Direct them to the link for the online banking.
  - Once they are at the login/logon screen direct them to either enroll or log on and then if they request help them from there.
- **Do I need to enroll for the new website?**
  - Yes, but if you remember your logon info for the old site, you can use it for the new site you may just need to add a special character to it.
- **What is new about the new online banking site?**
  - The new online banking site is an interactive interface.
  - This means you will be able to make transactions in real time.
  - You will also be able to see your transactions being made sooner than you were able to with the old system.
- **When I make a transfer on this new site, is it automatic?**
  - Yes, if you complete the transaction you will be able to look at your **history** and see that it has been made and see your new balance.
  - The new online banking site is tied to our system here at the credit union so we will be able to see the transfer as well but we are not the ones making the transfer.
- **How do I view my full transaction history?**
  - There are two ways to view your history.
    - The first way is by clicking on the blue account link you want to look at; these are located under the **balance box** on the main **overview screen**.
    - The second way is to look at the **Recent History box** on the main **overview screen**.
      - In the bottom right hand corner of that box it a blue link labeled ***View all History.*** Click on that link and it will take you to your transaction history.
- **How can I view the history of a different account once I'm in the history screen?**
  - To view a different account history without leaving the **History screen**, you will see at the top of the screen there is a **drop down box** with the current account you are looking at. Click on that **drop down box** and you will be given a list of your accounts, you can then click on the account you wish to look at and it will pull up.
- **How can I view all my accounts? (If they have more than five accounts)**
  - Your accounts are displayed in the **Balance Box** on the **Overview screen**, if you have more than five you will not be able to them all.
    - To view them there are a couple ways to do this,
      - The first way to view them all is to click on the link in the bottom right hand corner of the **Balance Box** on the **Overview Screen**.
      - The second way to view your accounts is to click on the **Accounts Access** tab at the top of the screen.
- **How do I display the accounts that I use the most, if I just need the site for a quick glance?**

  - To display the accounts you use the most you will need to click on the tab at the top of the screen for **Self Service**.
    - Once in the **Self Service Screen** you are going to want to find the blue link labeled **Preference**. Click on this.
    - You will be directed to another screen where you can then pick which accounts you wish to see when you log on.
    - *****Note: this is not an immediate change, you will need to log out and then back in if you wish to see the change.**
- **<u>Why does the description only say Branch…? (examples: Branch Cash Withdrawal, Cleared Check, Branch Transfer, Branch Deposit)</u>**
  - On this new site, all transactions are labeled with their type, to view the full description you will need to go into your **transaction history** to see the full description.
  - *****Note for staff:** This may change if the history box on the overview screen is extended to show the full description.
- **<u>How do I pick e-statements?</u>**
  - If you want to receive **e-statements** instead of statements in the mail, you will need to go to the **Self Service** screen. You will see a box labeled **Additional Services**, in that box is a link for **e-statements**. Click on that.
- **<u>Why is it not letting me pick e-statement?</u>**
  - You must find the link for the **Sample PDF** near the bottom of the screen. This will be near where you are choosing to pick e-statements. Once you have viewed the **sample statement**, you will then be able to choose to receive e-statements.