What is the New Online Banking Home Page?

It's an entirely new landing page that puts all of the tools for financial management in one convenient place. It provides current account information and allows you to transfer funds and view recent transactions without leaving the page.

What is the new Home Page expected to accomplish?

The new Home Page provides you with a comprehensive view of your finances. This will make your money management easier and help you make better financial decisions, save money and reach your financial goals. It helps you do your everyday money management tasks quickly and easily all in one place. In fact, we've brought together the tools needed to perform your most common daily tasks without ever leaving the page. *You can easily:*

- Check all of your account balances at once
- Take a quick peek at your most recent transactions
- Transfer funds
- Make a loan payment within My Accounts

NOTE: If you do not have any accounts set up in online banking yet, the page will just display the message, **"You do not currently have any accounts."**

What's on the New Home Page?

The New Home Page contains task-specific areas that are usually found individually on several different pages within Online Banking: Account Summary, Account History, Bill Pay, and Transfer Funds. **NOTE:** If you do not have any accounts set up in online banking yet, the page will just display the message, **"You do not currently have any accounts."**

My Accounts

This is where you can see all of your accounts and balances in a glance without having to scroll. In the upper-right portion of My Accounts you will find the **Make a transfer** icon and link that enables you to make a one-time funds transfer between your accounts and much more. To view the most recent activity for any account, click the **Quick Peek** link. Clicking **Quick Peek** opens a new window that shows the most recent transactions or payment activity for the account along with links to **Make a Transfer** and **Go to account history**.
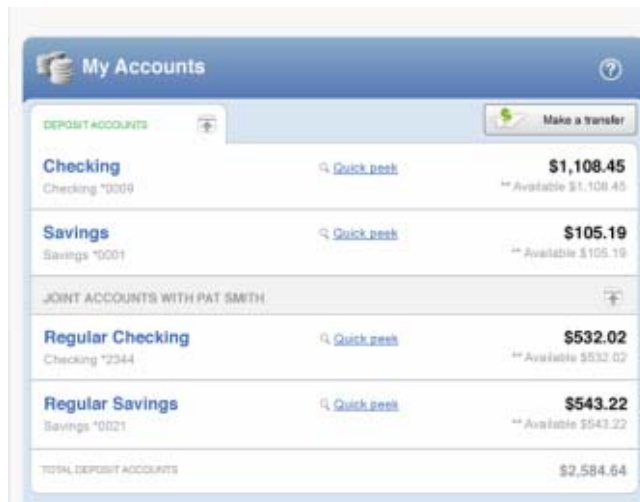
Make a transfer

Just select the **Make a transfer** button to make a one-time transfer between your accounts.

Selecting the **Make a transfer** button opens the **Move Money** window above the My Accounts list. Just enter the amount, select the transfer To and From accounts and add a memo if needed, then click the **Transfer** button and confirm the transfer details and you're done. Transactions now post immediately when you complete a transfer. This means that we will automatically refresh the page (to get the new account balances) when you close the transfers success window.

NOTE: If you are making a loan payment, additional fields may be available to enter the required information.
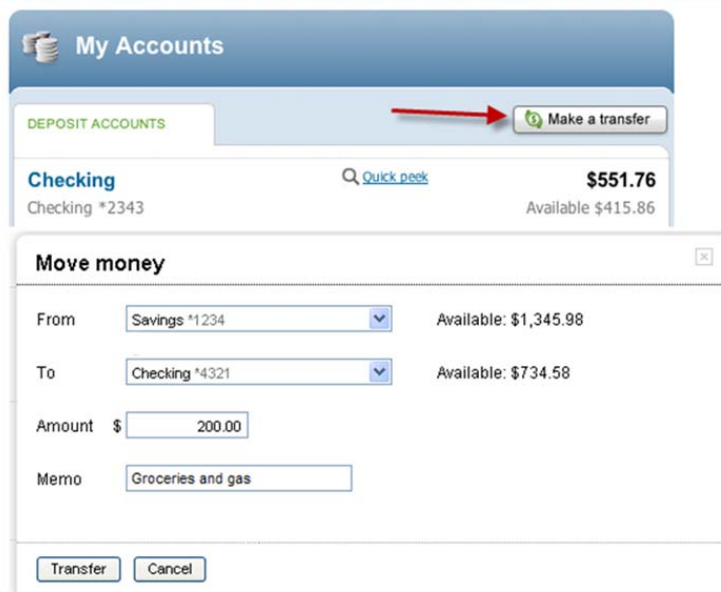
Make a Payment

If you are not yet a Bill Pay user, the **Make a Payment** section will display a message about paying bills online. Just click the **Start Now** link below the message to go to the Bill Pay enrollment page. Once logged in select the Start Now button to see the step-by-step process for setting up a bill payment.
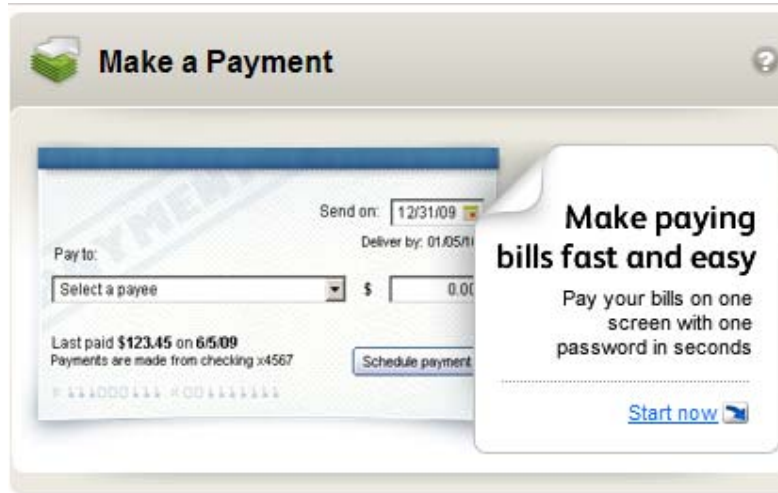
How can I get to other pages in Online Banking from the New Home Page?

You can use your standard menu and submenu selections to navigate around Online Banking like you do now. However, each section of the New Home Page has a link that will take you to other pages within Online Banking that may help you do things that are not currently available on the new page.

- In the **My Accounts** section you will find a **Quick Peek** link to the right of each account name. Clicking the link opens a new window listing the most recent transactions. At the bottom of the window you will find a **Go to account history** link, which, when selected opens the New Account History Page for that account.

Can I copy and paste transactions into a spreadsheet?

Yes you can copy data from the transaction list and paste it into standard spreadsheets like Excel. Just highlight and copy the data you want (e.g., date, description or amount) from Quick Peek and paste it into a row of the spreadsheet.

Can I do a browser search on the New Home Page?

Yes, you can use Control + F to do a simple browser search for an amount, date, payee name, etc. within Quick Peek. For example, just open the browser search field (Ctl F) enter the payee name and click the Next button.

Which browsers can I use to view the New Home Page?

Browsers that are officially supported include Microsoft Online Explorer (IE) 8.0+, and Mozilla Firefox 4.0+. Currently, we don't officially support other modern browsers (like Chrome), but there is a good chance the page will work if you use them. **NOTE:** We do not support Online Explorer 6.0+ and 7.0+ and realize that some functional and display issues may occur with those browsers.

You may notice a green colored announcement just below the top menu that encourages you to upgrade to the latest browser. Doing so will enhance the speed and functionality of the new online banking pages.

Where can I check my account balances?

The **My Accounts** section in the upper left area has all of your accounts categorized by type (Deposit, Savings, Loans, etc.) with the current balance and available balance for each account. Within each category group the accounts are listed in alphabetical order by name – *either the **original account name** or the **account nickname** that you assigned*.

Your first Deposit account is displayed at the top of the list and shows the balance and available balance. The **Total Accounts** value is displayed at the bottom of each account section.

Where can I find my transactions?

Clicking **Quick Peek** opens a new window that shows the balance and available balance along with the most recent transactions or payment activity for that account. High transaction volume accounts (like Checking) will show 5 days of account activity. Low volume accounts (like loans) will show 30 days of account activity. You will also find helpful links to **Make a Transfer** and **Go to account history** at the bottom of the window.

Just click the X button on the top right or anywhere outside of the window to close it. Clicking the account name or the **Go to account history** link opens the New Account History Page for that account.

How can I make a one-time transfer using Move Money?

In the upper right portion of the **My Accounts** section you will see the **Make a Transfer** button. Clicking the button opens the **Move Money** window. Select the **From** and **To** accounts, enter the transfer amount and memo text, if needed, then click the **Transfer** button. **NOTE:** You can use the switch accounts button (⬙) to switch the From and To account values.

When you click the **Transfer** button you will get a message asking you to confirm the funds transfer, as seen in the example below.
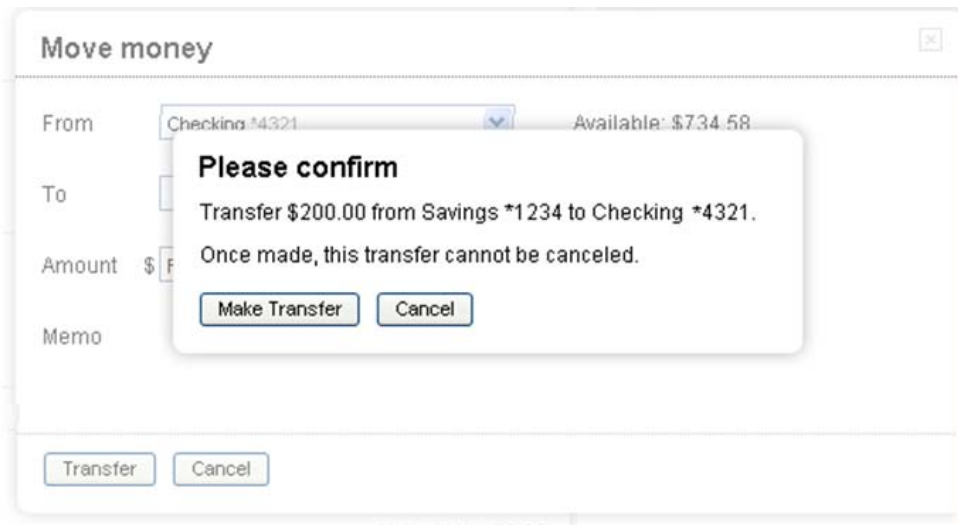
When you click the **Make Transfer** button a transfer complete window will display with all of the relevant transfer details and the option to **Make another transfer** or **Print** the transfer details. Transactions will post immediately when you complete the transfer.

This means that we will automatically refresh the page (to get new account balances) when you close the transfers success window shown below. **NOTE:** If an issue should occur during the transfer process, an error message will instruct you what to do next.

Make a Payment

If you are already using Bill Pay in Online Banking, you can schedule a payment by clicking on the **Go to payments** link on the check image on the home page. This will open a new window in Payment Center.


Select the Biller Name; select the payment amount and the payment date using the calendar tool. Then click the **Make payments** button to schedule the payment.
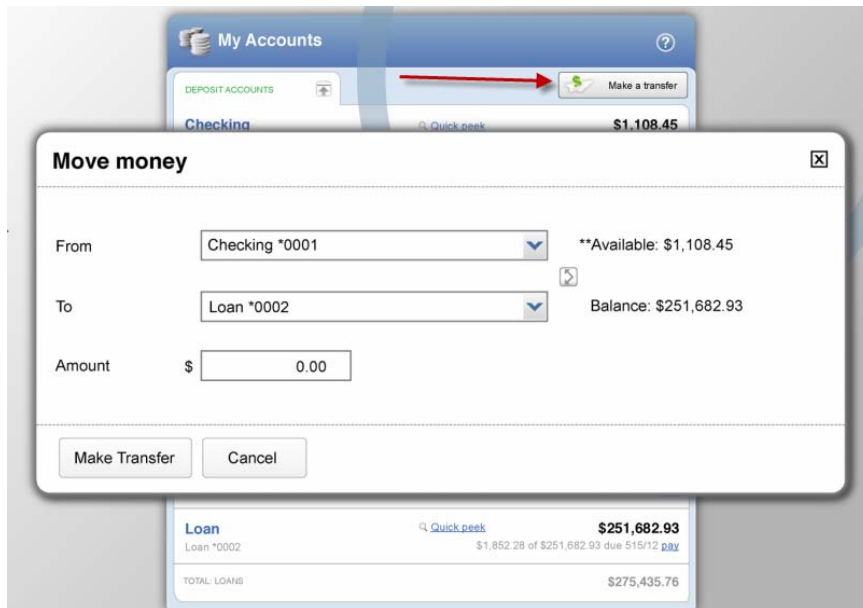
Payment Center

Pay Bills			?
Pay From *54321 ▾ Preferred Account		**Available Balance: $3,032.70**	
Features	**Biller Name**	**Amount**	**Pay Date**
🔲	ABC Mortgage *45678	$	📅
	American Natural Gas *56734	$	📅
e BILL	Credit First Visa *1056	$	📅
e SIGN UP	National Power Company *0948	$	📅
e DUE	Western Auto Finance *5821	$	📅
	Joe's Lawn Care *67512	$	📅
	Kelly Thomas	$	📅
			Make Payments

How do I make a loan payment using Move Money?

To make a loan payment using Move Money:

1. Click the **Pay** link to open the Move Money window

2. Select the **From** account from the drop-down list (the Available dollar amount will be displayed)

3. Select the **To** account from the drop-down list (the Balance amount will be displayed)

4. Review the **Amount** to be paid

5. Click the **Transfer** button and review the payment details

6. Click the **Make Transfer** button to complete the payment and display the payment details

7. Click **Make another transfer** to make another transfer or payment, click **Print confirmation** to print out the payment details, or click **Close** to close the Move Money window

How long does it take for transfers to display?

Transfers made on the New Home Page will display immediately in the **My Accounts** list and the New Account History Page transactions list if it's supported. This means that we will automatically refresh the page (to get new account balances) once a user closes the transfers success window.

Where can I find my detailed account history?

Just click the account name link that you want to open the New Account History Page. The page will open with transaction details for your default date range. Or you can click on the **Go to account history** link in the Quick Peek window to directly access the New Account History Page.
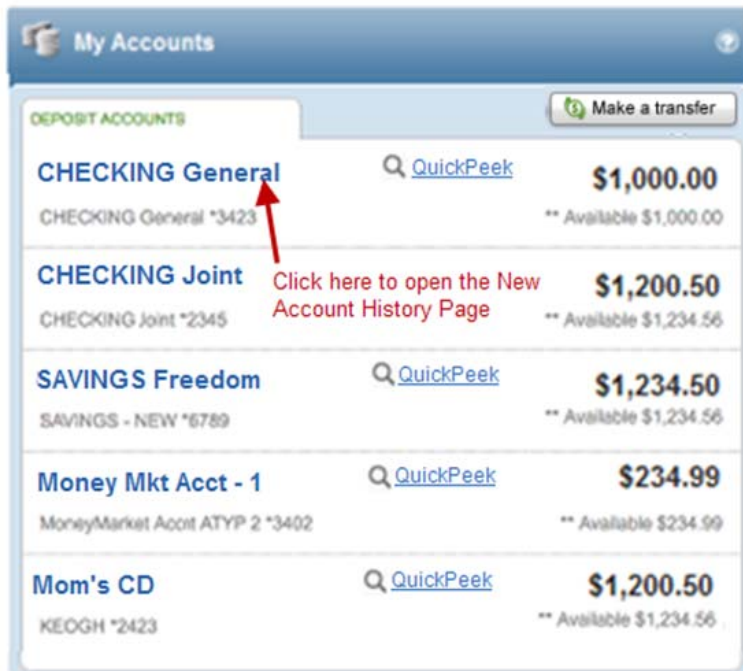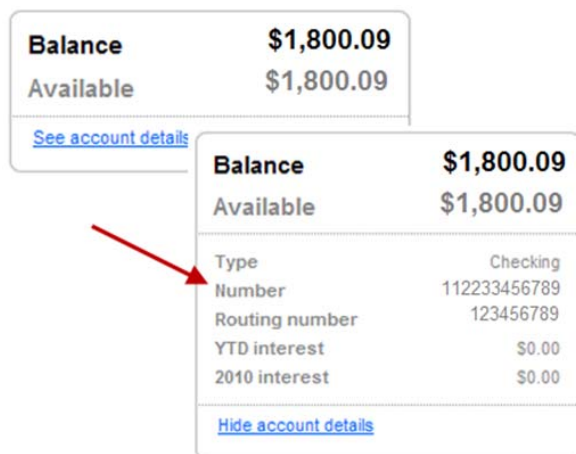

Where can I find my full account number?

Go to the account you want and click the account name link to open the New Account History Page. Click the **See account details** link in the account summary window in the upper right-hand part of the screen. If itl's available, your full account number will be listed with other relevant account details. *Note: Routing Number may not be available.*

When you are finished just click the **Hide account details** link to collapse the extra information. (**NOTE:** Your account number can also be found at the bottom of a physical check. It's the last 7-10 numbers on the right side.)

Where can I see my check images?

First go to the My Accounts area and find the account you're looking for. Click the account name link for that account to open the New Account History Page. The check will display as a link, typically with the check number. Simply click the link to view images of the front and back of the check. Click the **Close** button at the bottom of the window when you are finished.

How do I print my transactions and check images?

First go to the My Accounts area and find the account you're looking for. Click the account name link for that account to open the New Account History Page.

Print Transactions: Make sure the date range is what you want (e.g., 30 days) or select a different date range using the **Change** drop-down list. Click the **Print** icon or link to open a separate window showing the transactions in a printer friendly format. Select a printer, if needed, and click the **Print** button to send the transaction list to the printer.

Print Check Images: In the New Account History Page, open the account that you want and then click the check link that you want to print. With the check images displayed, click the **Print** icon or link. Select a printer, if needed, then click the **Print** button to send the check images to the printer.

How do I change my default start page?

That's an easy one. Just scroll to the bottom right-hand corner of the page and click the **Change start page** link. The system will ask you to enter a brief reason, but it's optional, and then click the **Change page** button. The system will return the confirmation message 'Change saved.' And the next time you log in, the Account Summary page will be your default start page.

To change your start page to something other than the Account Summary page, access **User Options** and select the **Change Start Page** link. Select a new start page from the dropdown list and click the **Change Home Page** button to save the change.

NOTE: If you should decide at some time point that you would like the New Home Page to be your default start page, just click the **Home** link in the top menu then scroll to the bottom right of the page and click the **Make this your start page** link. The system will return a **Change saved** confirmation message. And the next time you log in, the New Home Page will be your new start page.

How do I create or change nicknames for my accounts?

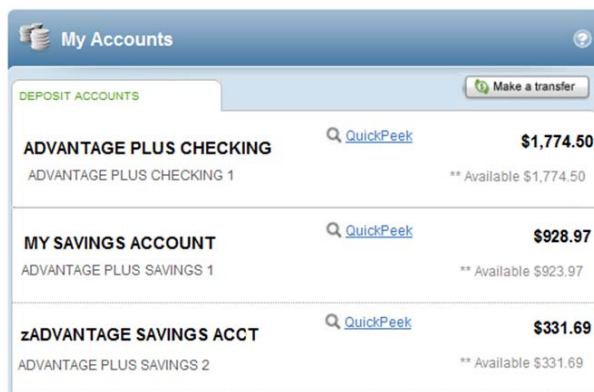If available, it's very easy to do:

1.   Click **User Options** in the top navigation within Online Banking.

2.   Click the **Change Account Nicknames** link (the name of the link may vary).

3.   Find the account you want and type the new name in the **Nickname** column field.

4.   Repeat this for each account that you want to change.

5.   When finished, click the **Change** button.

6.   You should see your account nicknames the next time you log in to online banking.

NOTE: These changes can take up to five minutes or more to take effect.

How do I change the order of my accounts?

Your account categories have been set up to automatically display in a certain order: Checking, Savings, Money Market, Certificate of Deposit, Loans, etc. However, if you happen to have multiple accounts within a given category (e.g., two or more savings accounts), you can change the display order of those accounts.

The account names or nicknames within a category appear in alphabetical order, so you can change the account nicknames so the accounts display in the order you want, e.g., My Savings Account will display before zAdvantage Savings Acct because of the added 'z' (click here to see how to change an account nickname).