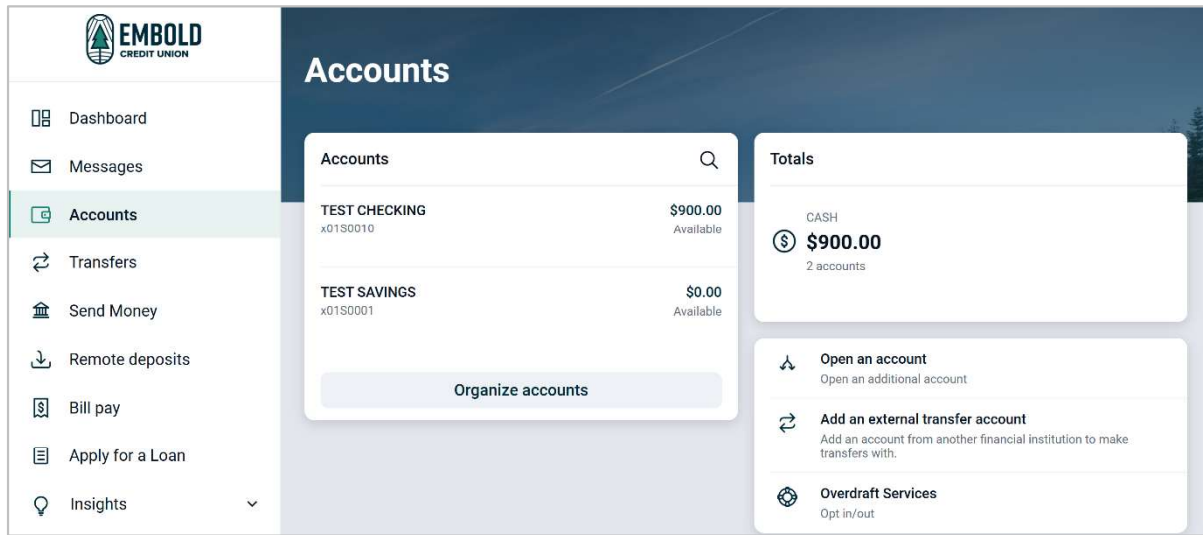


Accounts

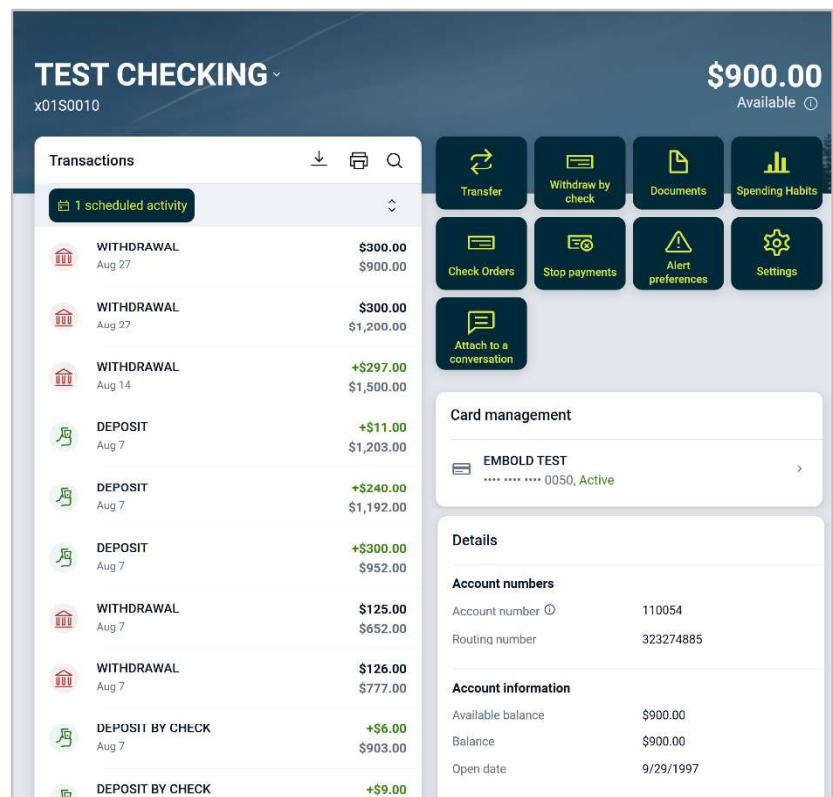
Select **Accounts** to see a listing of all the accounts tied to your online banking profile.



Account Information

Select an account from the **Accounts** page or from the Dashboard.

- **Transactions** card - View recent account activity.
 - Click the **Download** icon to download into CSV, TXT, OFX, QBO or QFX format.
 - Use the **Printer** icon to print.
 - Use the **Search** icon to filter transaction activity.
- **Quick Action Buttons**- quickly access other features for this account.
- **Card management**- select a card to toggle it on or off, report it lost or stolen, reorder, or activate a new one.
- **Details**- review account details such as account and routing numbers, account owners, important dates, and interest rates.



Transaction Details

On the Account home screen, select a transaction to view additional information.

- Click **Add tags** to categorize the transaction.
- Click **Add notes** to include details to accompany the transaction description.
- Click the **+** under *Add images* to add an image such as an invoice or receipt, or click the icon (if available) to review check images.
- Click **Attach to a conversation** to attach transaction details to a conversation that can be sent to support or another user at your company.

Transaction details



WITHDRAWAL BY CHECK CHECK 00 995351 DISBURSED

Banking

\$300.00

8/27/2026

Edit details



Add tags



Add notes



Add images

+



Attach to a conversation

Account Settings

Change how the account appears within online banking, update preferences, and manage alerts. From within the account, select an account to manage, then select **Settings**.



Dashboard

Messages

Accounts

Transfers

Send Money

Remote deposits

Bill pay

TEST CHECKING

x01S0010

\$900.00

Available

Transactions

1 scheduled activity



WITHDRAWAL

Aug 27

\$300.00

\$900.00



WITHDRAWAL

Aug 27

\$300.00

\$1,200.00



WITHDRAWAL

Aug 14

+\$297.00

\$1,500.00

Transfer

Withdraw by check

Documents

Spending Habits

Check Orders

Stop payments

Alert preferences

Settings

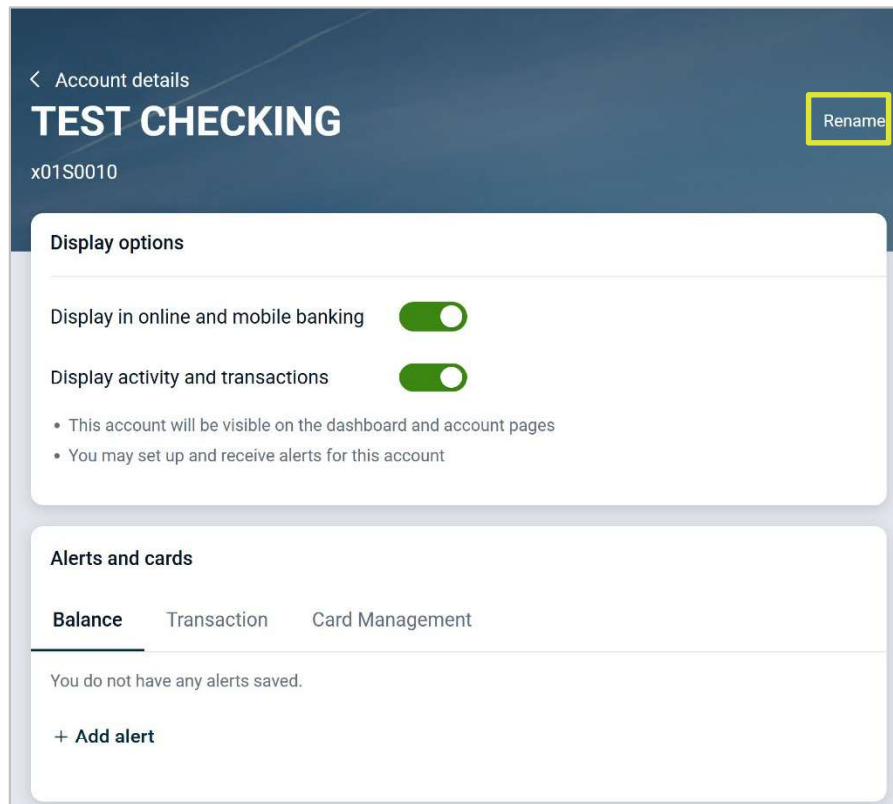
Attach to a conversation

Digital Banking
User Guide

17

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- **Rename** - Change the nickname of the account.
- **Display options** - Choose to display the account and/or activity in online banking.
- **Alerts and cards** - Add or modify alerts.



< Account details

TEST CHECKING

x01S0010

Display options

Display in online and mobile banking ☒

Display activity and transactions ☒

- This account will be visible on the dashboard and account pages
- You may set up and receive alerts for this account

Alerts and cards

Balance Transaction Card Management

You do not have any alerts saved.

+ Add alert

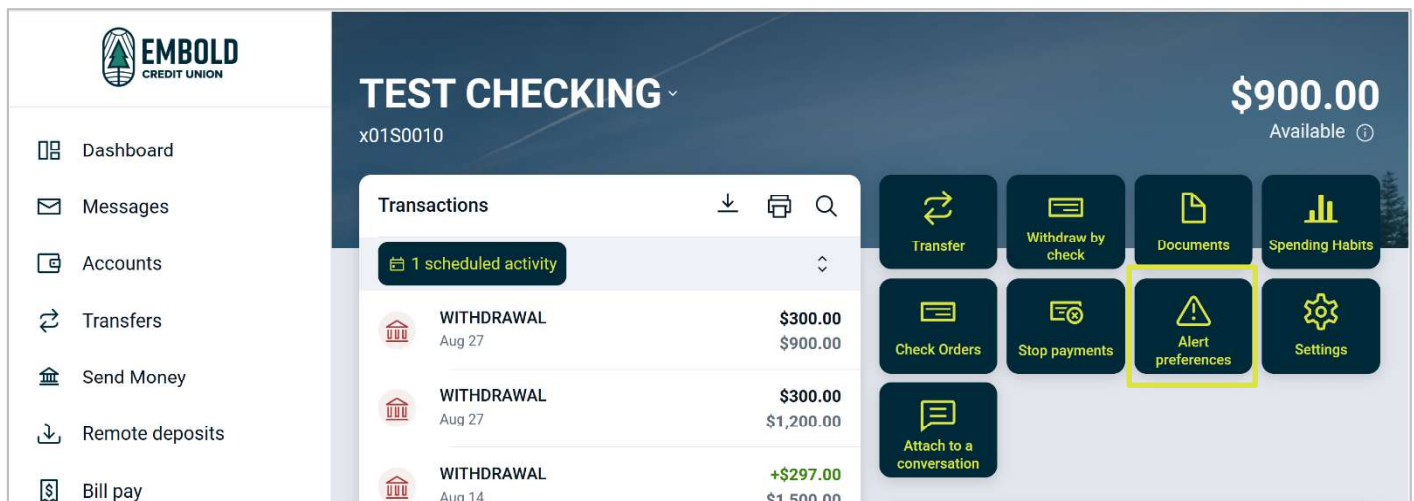
Rename

Alerts

Set up alerts to be notified about your balance or certain transactions.

Set up Balance and Transaction Alerts

1. Select an account and click **Alert Preferences**.
2. Select **Balances**, **transactions**, and **deposits**.



EMBOLD CREDIT UNION

Dashboard Messages Accounts Transfers Send Money Remote deposits Bill pay

TEST CHECKING

x01S0010

\$900.00 Available ⓘ

Transactions

1 scheduled activity

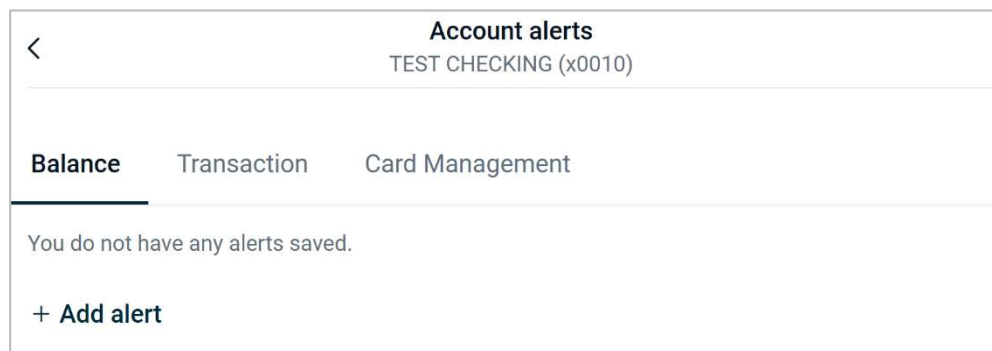
WITHDRAWAL	Aug 27	\$300.00	\$900.00
WITHDRAWAL	Aug 27	\$300.00	\$1,200.00
WITHDRAWAL	Aug 14	+\$297.00	\$1,500.00

Transfer Withdraw by check Documents Spending Habits

Check Orders Stop payments **Alert preferences** Settings

Attach to a conversation

3. Choose the appropriate **Balance** or **Transaction** tab to add your new alert to.
4. Click **+ Add alert**.



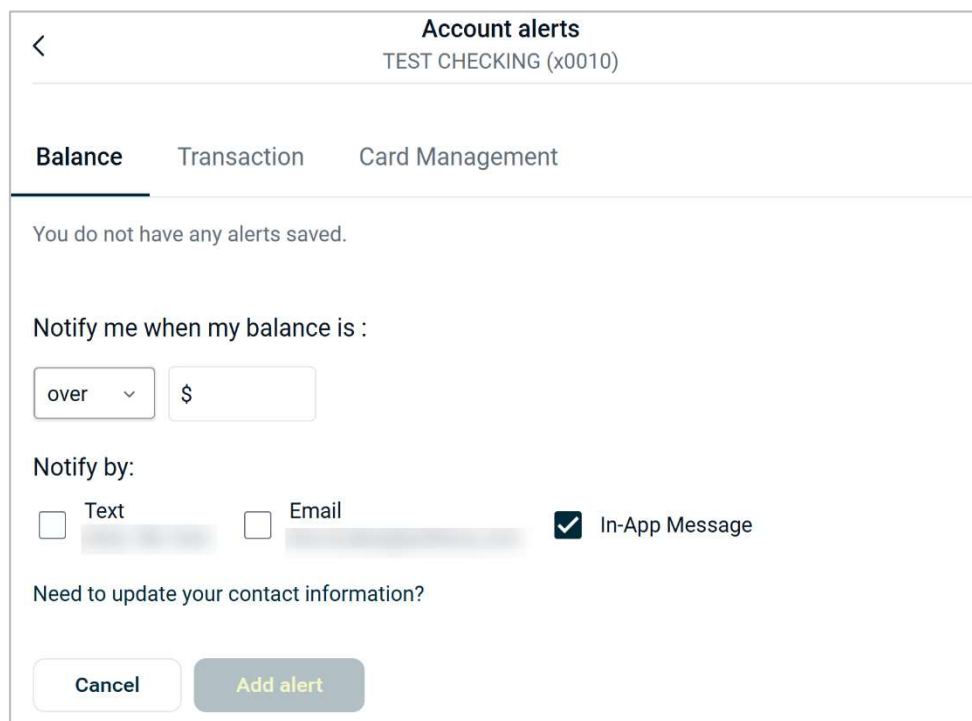
< **Account alerts**
TEST CHECKING (x0010)

Balance Transaction Card Management

You do not have any alerts saved.

+ Add alert

5. Complete the details and select how you'd like to receive the alert.
6. Click **Add alert**.



< **Account alerts**
TEST CHECKING (x0010)

Balance Transaction Card Management

You do not have any alerts saved.

Notify me when my balance is :

over \$

Notify by:

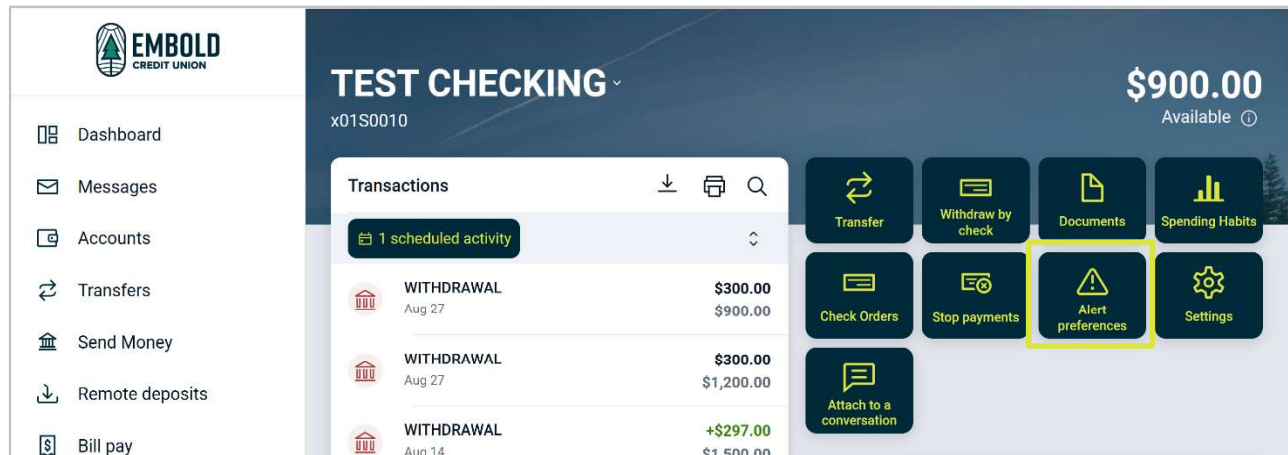
☐ Text ☐ Email ☒ In-App Message

Need to update your contact information?

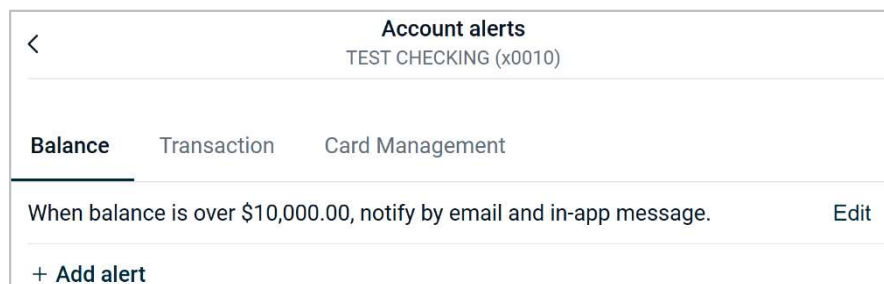
Cancel **Add alert**

Edit or Delete a Balance and Transaction Alert

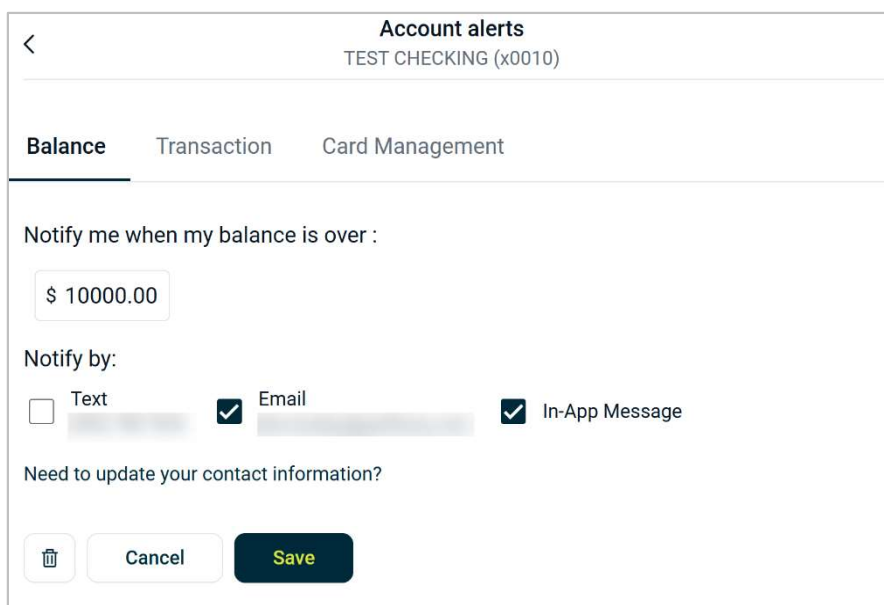
1. From within the account, click **Alert Preferences**.
2. Select **Balances, transactions, and deposits**.



3. Toggle between **Balance** and **Transaction** tabs to find the alert to modify or delete.
4. Select **Edit**.



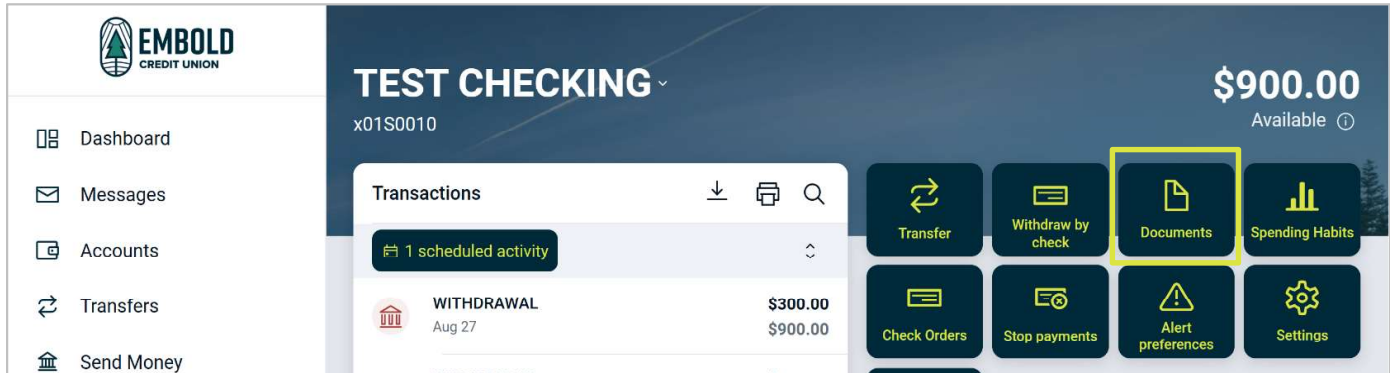
5. Modify the details.
6. Click **Save** or click the **trash can** icon to delete.



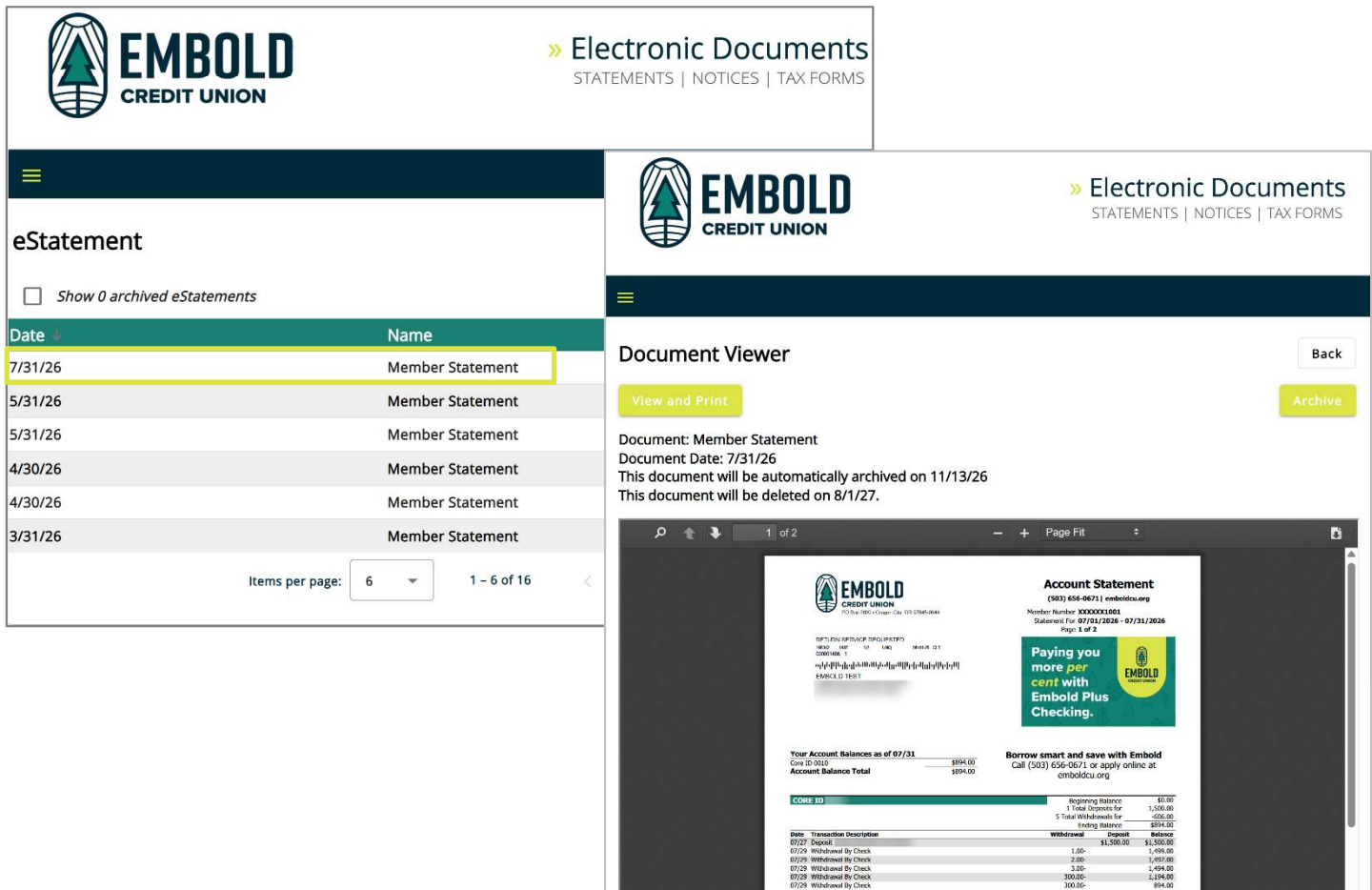
Documents

Enroll in eDocuments to stop paper documents from being mailed. You will receive a text or email notification (based on the preference settings you put in place during enrollment of electronic documents) when your electronic document is available to view.

1. Click **Documents** from the Accounts page or the Dashboard.



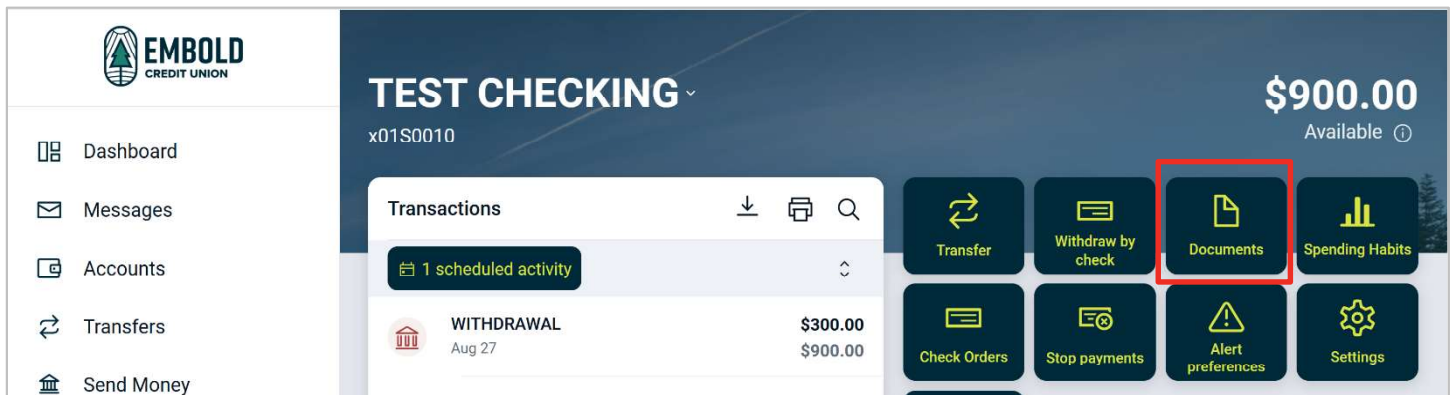
2. Select the share to view documents for and accept the terms and conditions.
3. Select a document from the list to display.
4. Click **View and Print** to save or click **Archive** to remove it from your list. Click **Back** to return to the documents list.



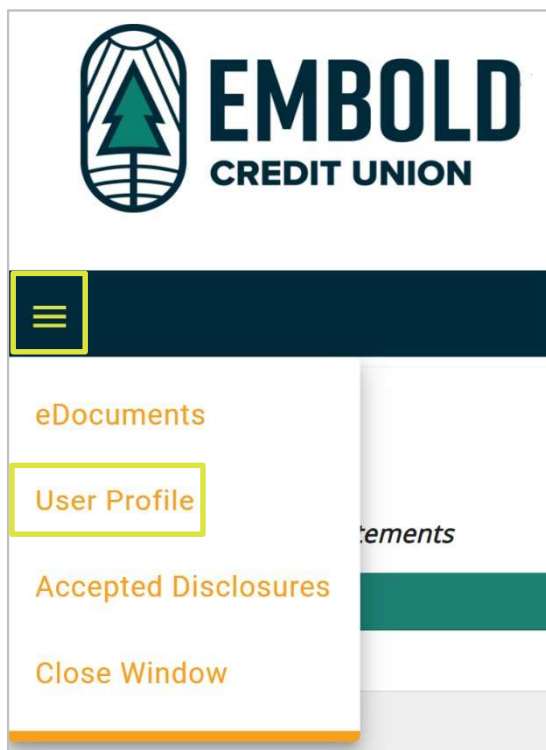
Document Enrollment Changes

Need to make changes to your Document enrollment?

1. Click **Documents** on your account page or from the Dashboard.



2. Select the menu and click **User Profile**.
3. Under Document Delivery Method, click the drop-down arrow and choose to receive your documents electronically, on paper, or both.



Change User Profile

Last Update Date 2/5/21, 12:32 PM

Email Address (This will not update what is on file at Embold CU)* ✕

Cell Phone Number* @txt.att.net ✕

Cell Phone Carrier*
AT&T ▼

Document Delivery Method*
Specify By Document Type ▼

Tax*
Electronic ▼

Notice*
Electronic ▼

Statement*
Electronic ▼

Save

You have the option to place a Stop Payment on either a single check or a range of checks. The Stop Payment Service Fee is displayed before finalizing the request. The stop remains active for six months, after which the payment(s) may proceed as normal. If you need assistance, wish to cancel a Stop Payment before the six-month period ends, or need to stop an ACH or recurring debit card transaction, please reach out to Embold by phone, starting a conversation in Digital Banking, or stopping by a branch.

1. Select an account and click **Stop payments**.



<

Stop payments

TEST CHECKING (x01S0010)

Check #

Check amount

Enter "0" if unknown or if it does not apply.

Check date

Select

Payee

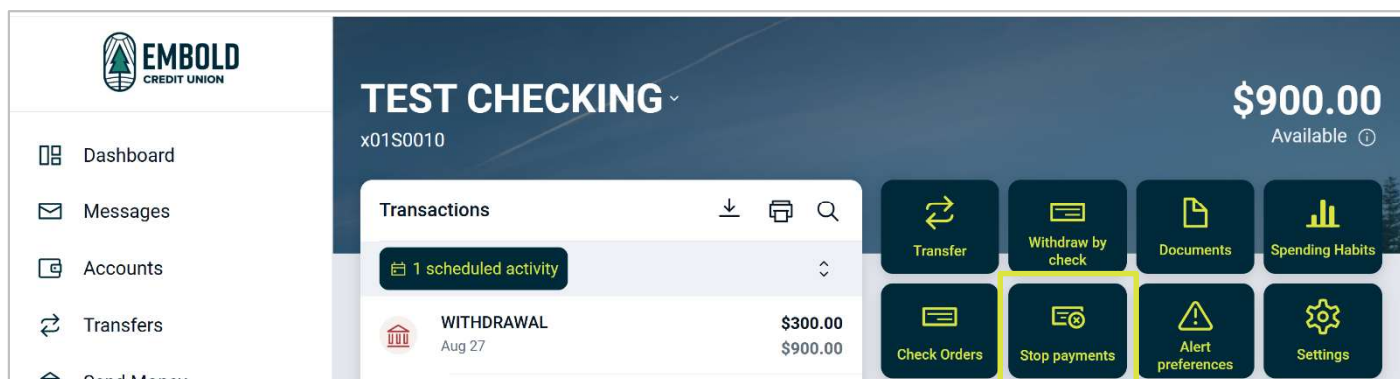
Reason

Select

Submit

Place a Stop Payment on a Range of Checks

1. Select an account and click **Stop payments**.



2. Choose **A range of checks**.
3. Complete the details and click **Submit**.

Stop payments
PERS CKG 0001 (x3859)

What do you want to stop?

☐ A single check
Stop a single check from being cashed.

☒ A range of checks
Stop a consecutive range of checks from being cashed.

Stop payments
FreeCkg 0001 (x5383)

Start check # _____ - End check # _____

Optional

Reason
Select _____

Submit