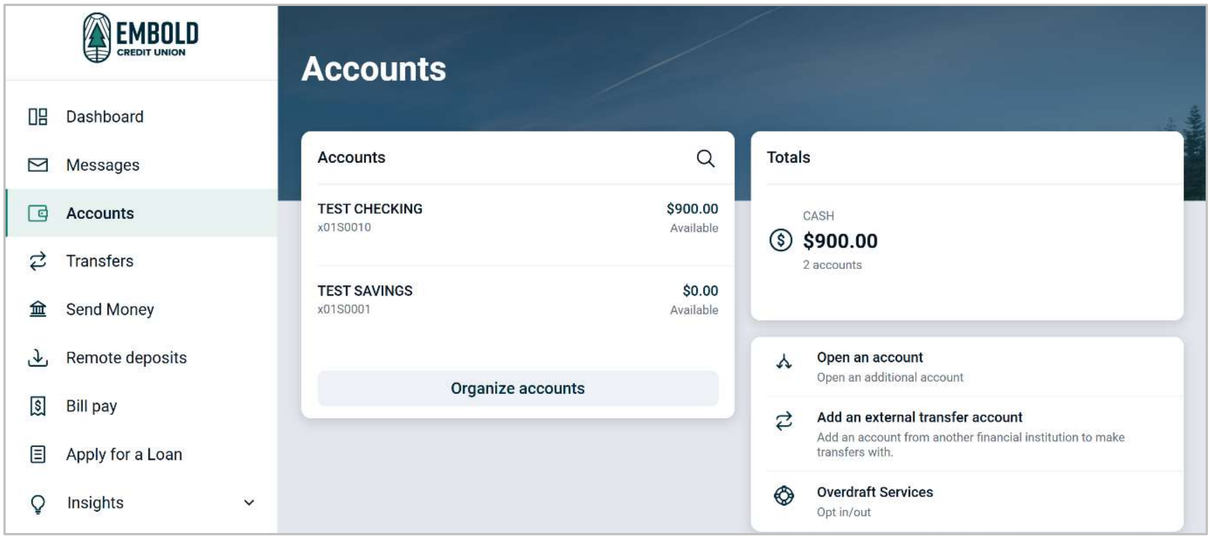
Accounts

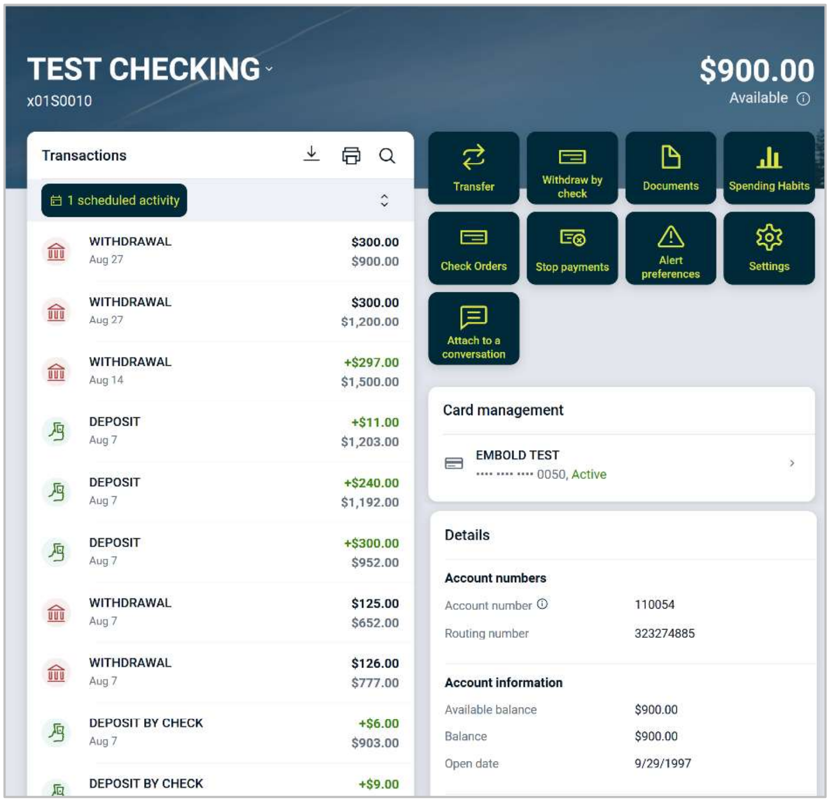
Select **Accounts** to see a listing of all the accounts tied to your online banking profile.



Account Information

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

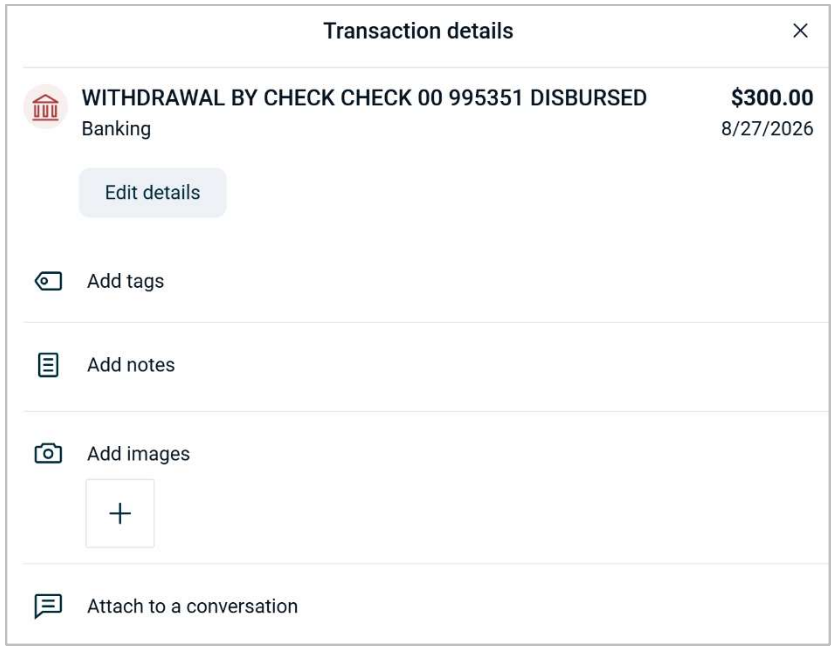
- **Transactions** card - View recent account activity.
  - Click the **Download** icon to download into CSV, TXT, OFX, QBO or QFX format.
  - Use the **Printer** icon to print.
  - Use the **Search** icon to filter transaction activity.
- **Quick Action Buttons**- quickly access other features for this 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

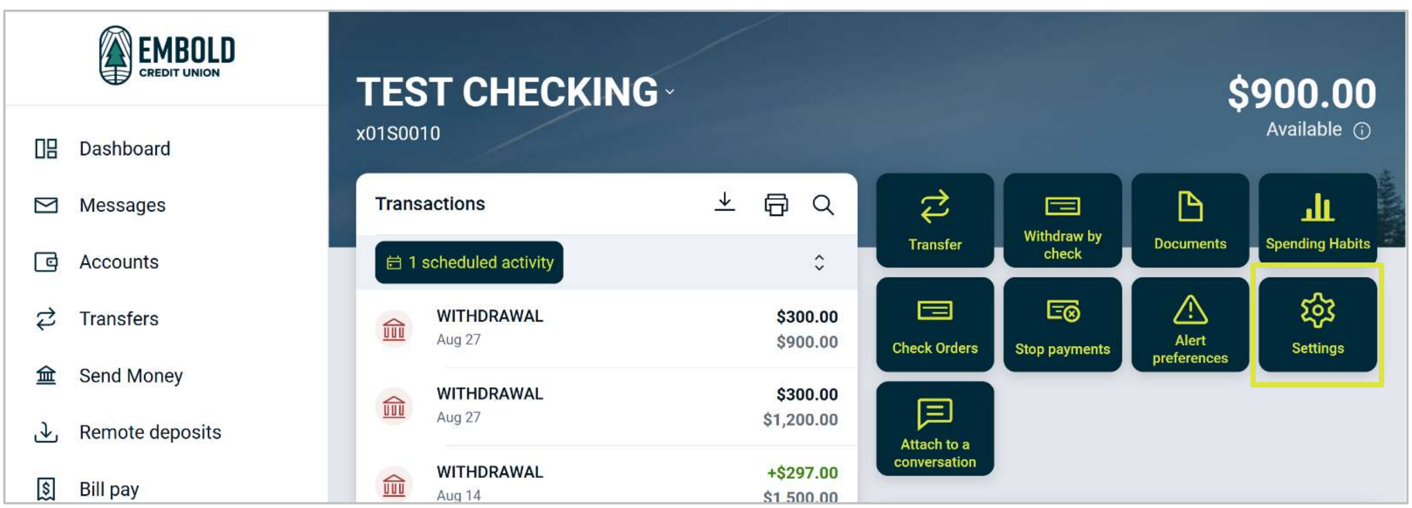
On the Account home screen, select a transaction to view additional information.

- 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.

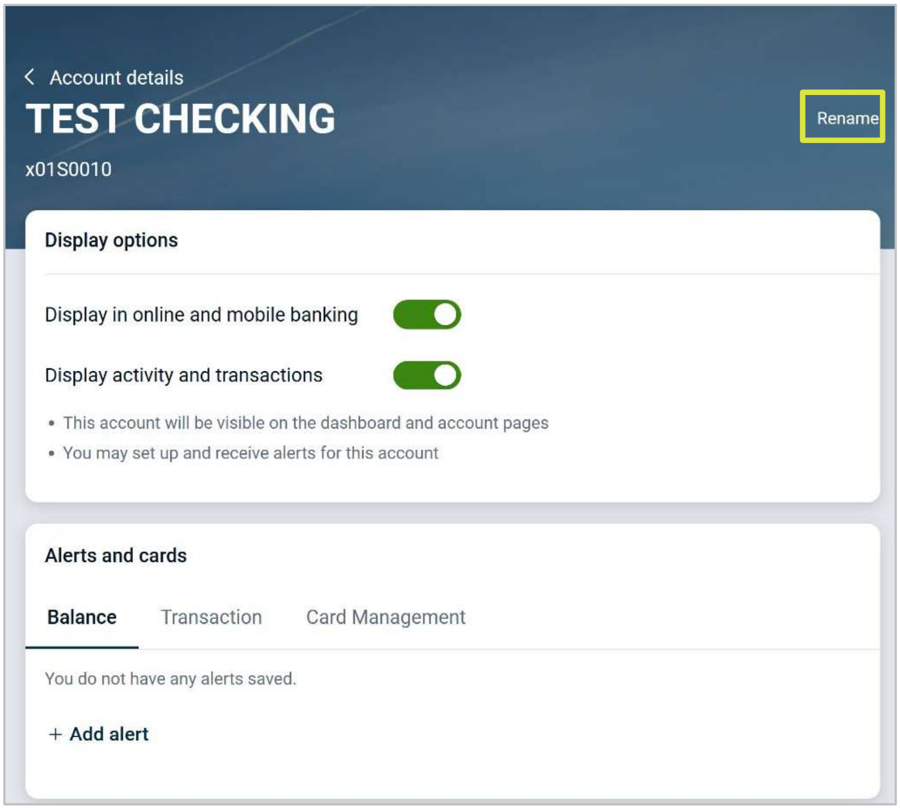


Account Settings

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**.



- **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.

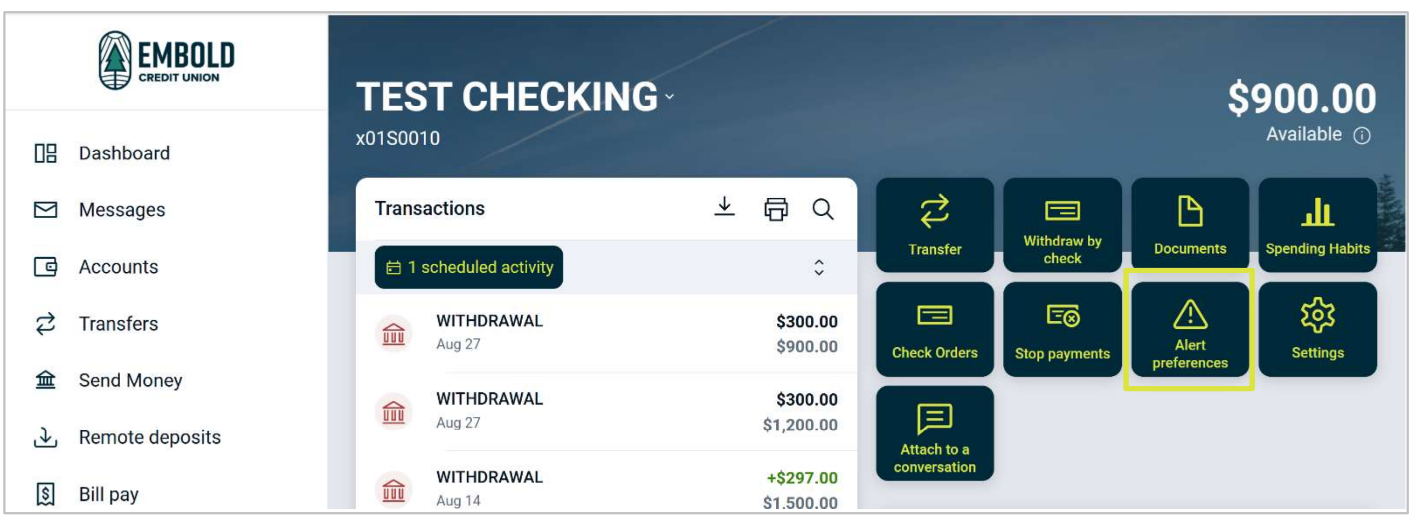


Alerts

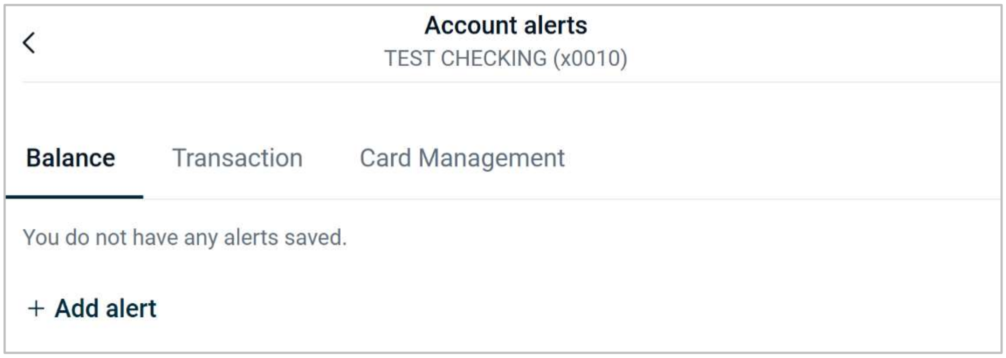
Set up alerts to be notified about your balance or certain transactions.

Set up Balance and Transaction Alerts

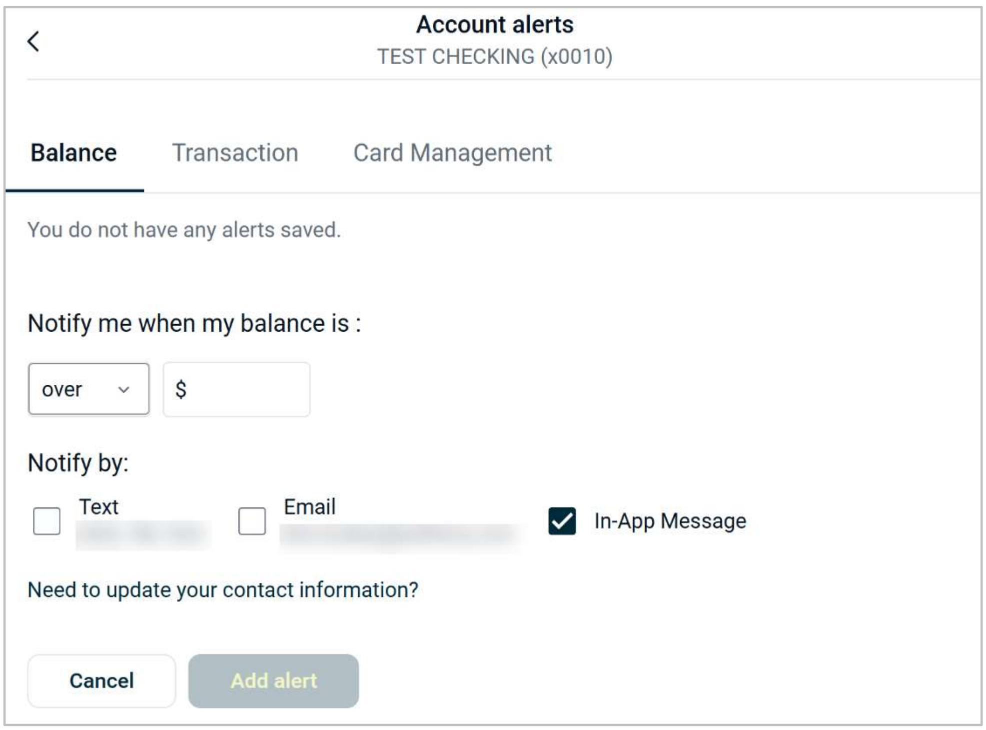
1. Select an account and click **Alert Preferences.**
2. Select **Balances, transactions, and deposits.**



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

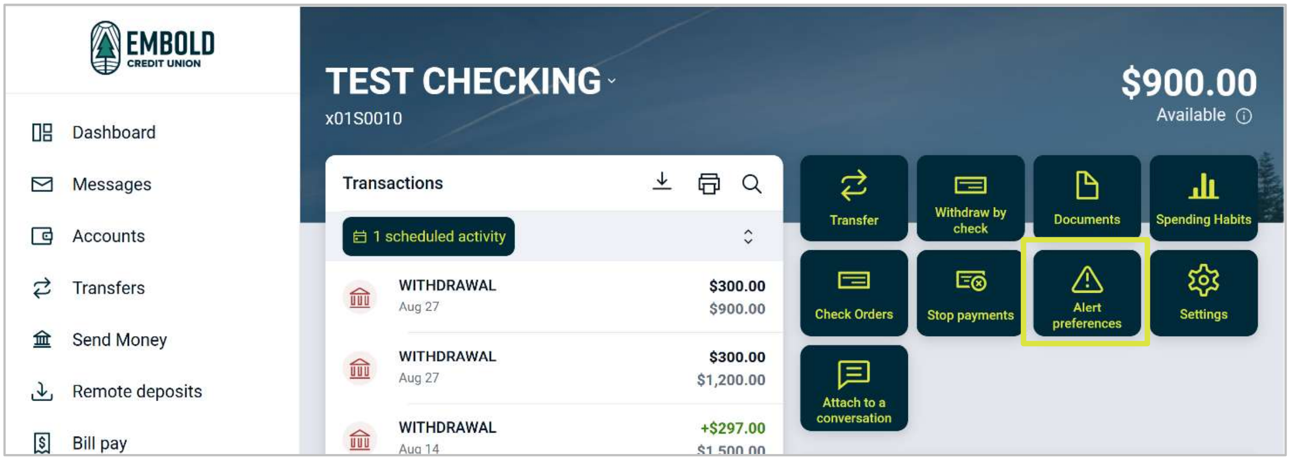


5. Complete the details and select how you'd like to receive the alert.
6. Click **Add alert**.

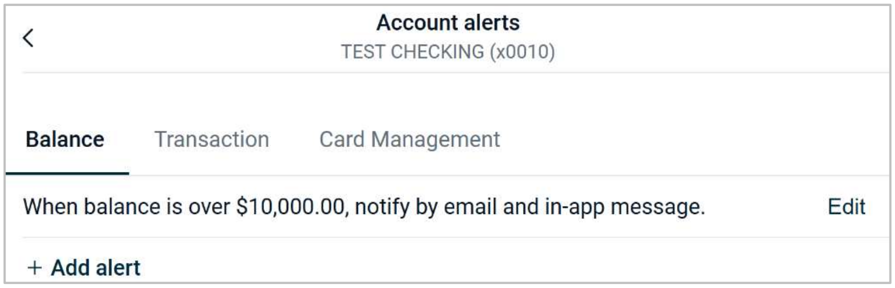


Edit or Delete a Balance and Transaction Alert

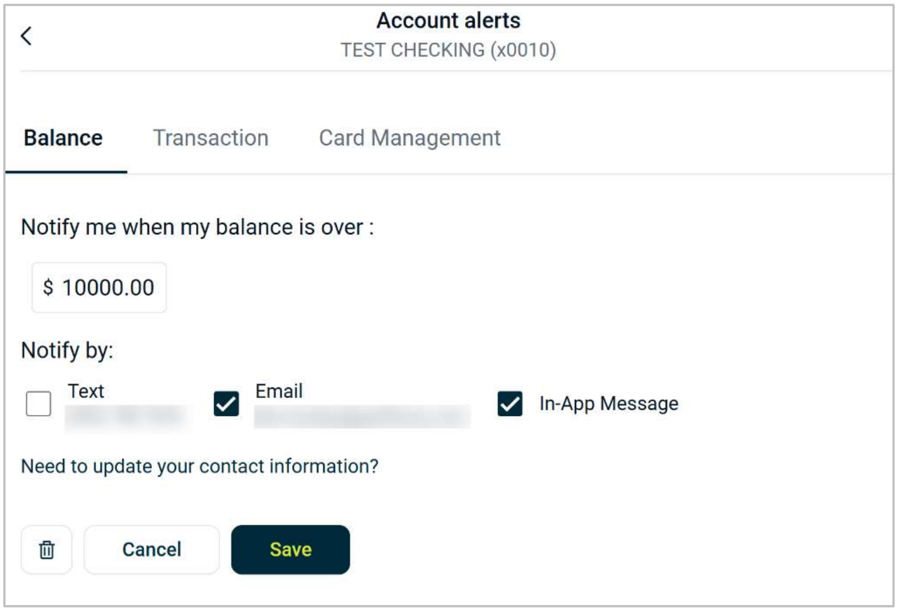
1. From within the account, click **Alert Preferences**.
2. Select **Balances, transactions, and deposits**.



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



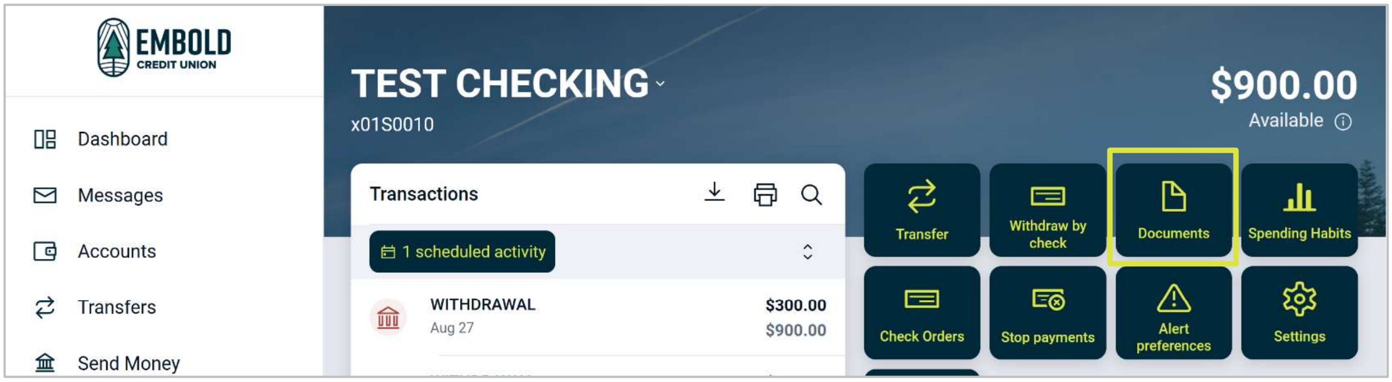
5. Modify the details.
6. Click **Save** or click the **trash can** icon to delete.



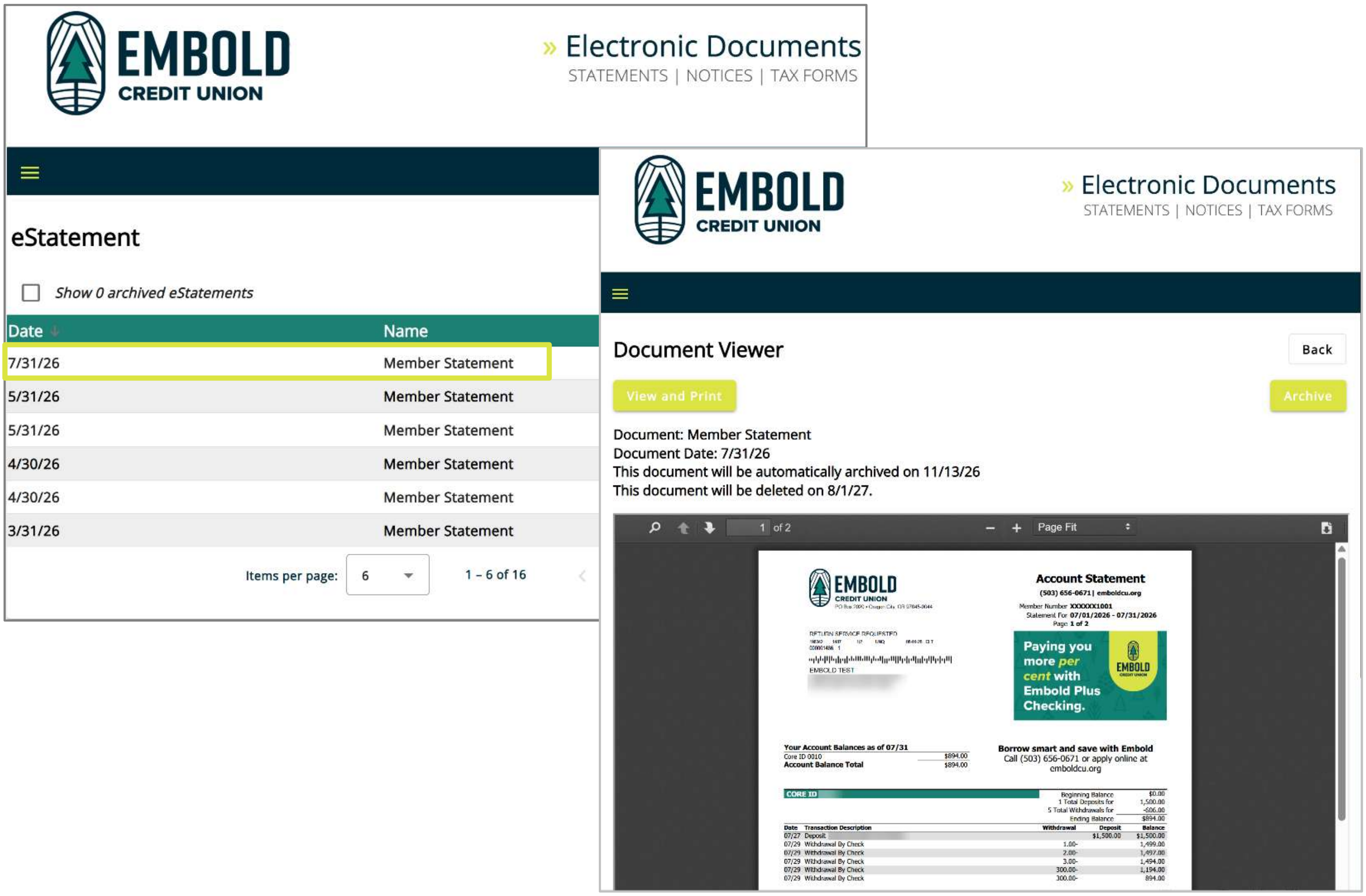
Documents

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.



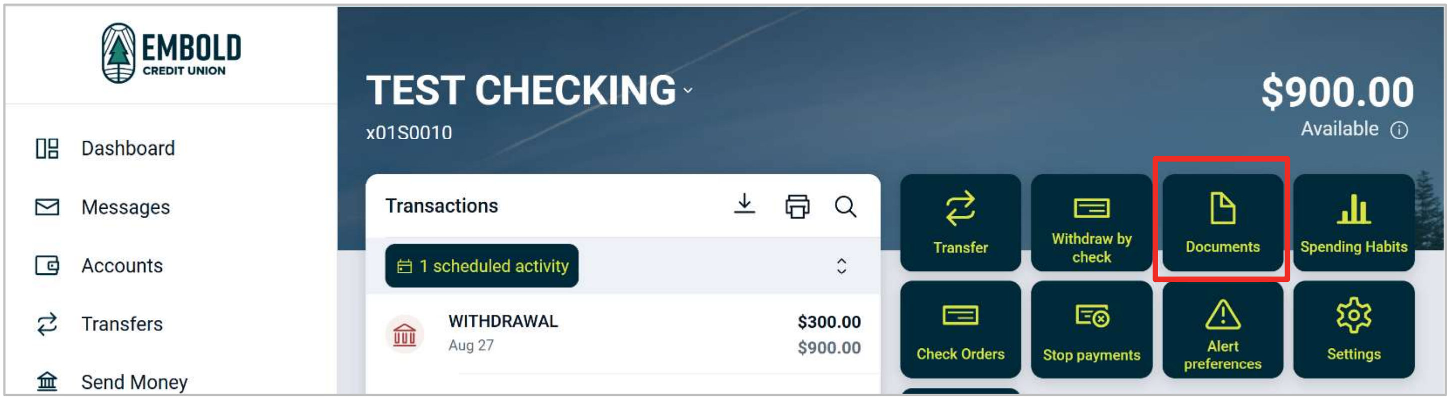
2. Select the share to view documents for and accept the terms and conditions.
3. Select a document from the list to display.
4. Click **View and Print** to save or click **Archive** to remove it from your list. Click Back to return to the documents list.



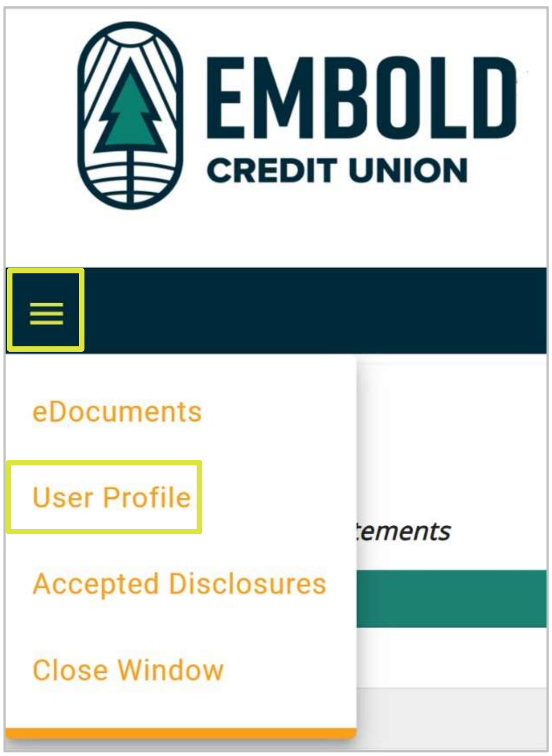
Document Enrollment Changes

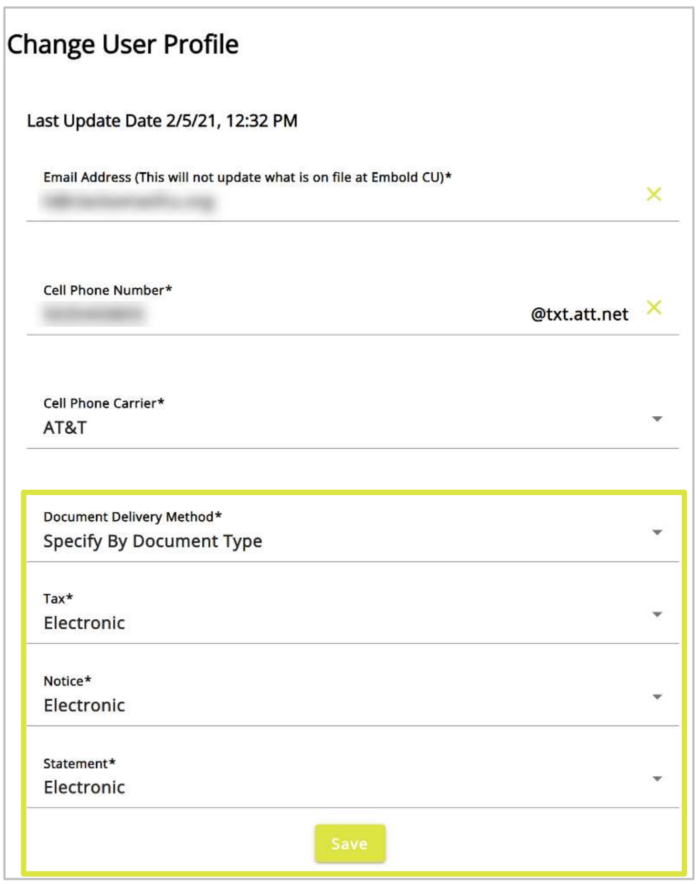
Need to make changes to your Document enrollment?

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.



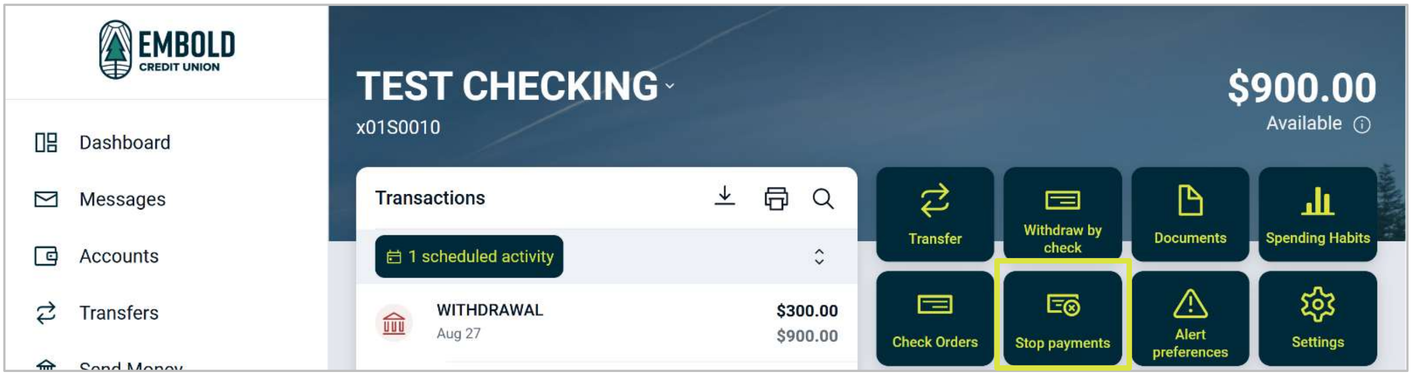


Stop Payments

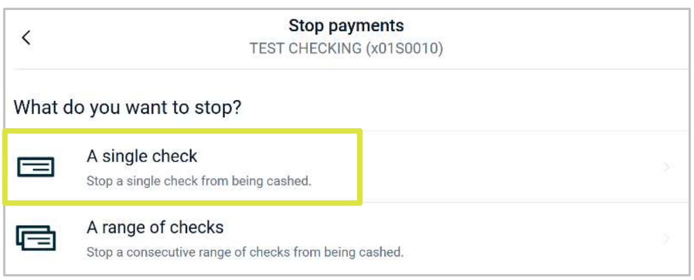
You have the option to place a Stop Payment on either a single check or a range of checks. The Stop Payment Service Fee is displayed before finalizing the request. The stop remains active for six months, after which the payment(s) may proceed as normal. If you need assistance, wish to cancel a Stop Payment 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.

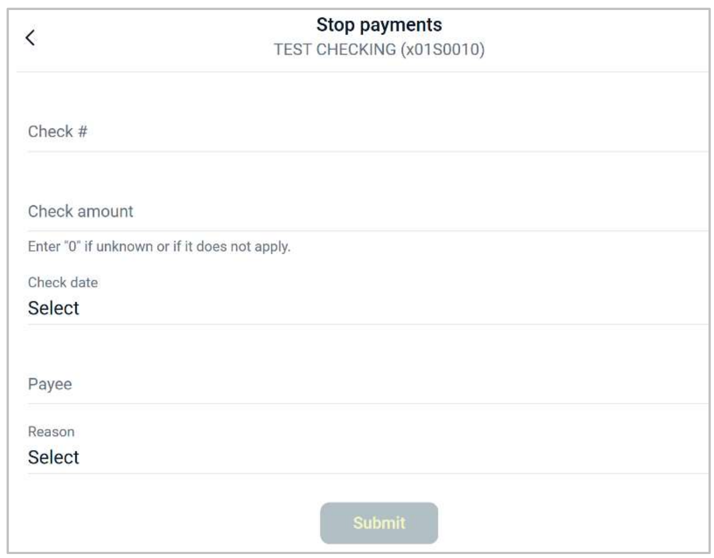
Place Stop Payment on a Single Check

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



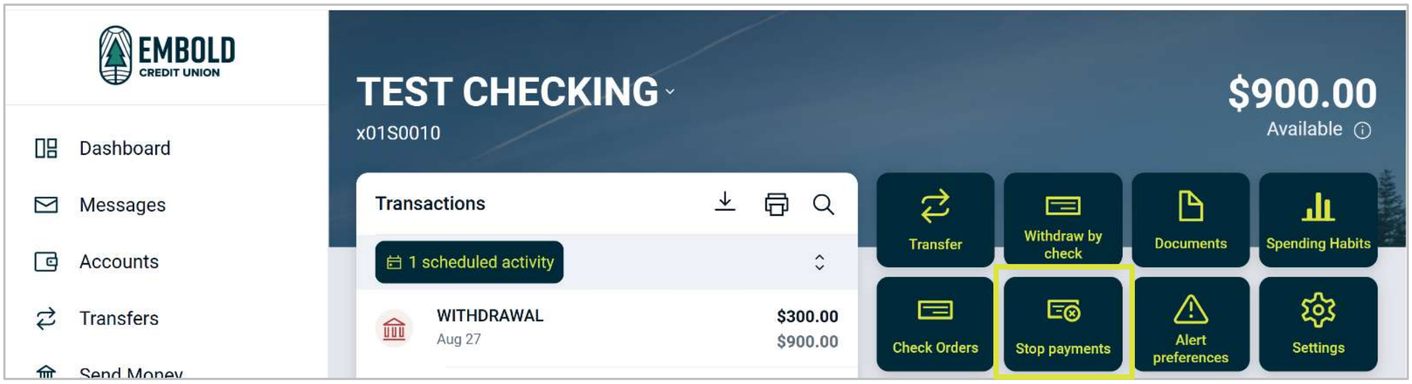
2. Choose **A single check**.
3. Complete the details and click **Submit**.





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.**