Online Banking UI FAQs

Q) How do I display only the transactions I'm looking for?

A) There are multiple ways to reduce the number of transactions displayed after you click on your account to display all transactions.

a. Enter specific data in the Search bar at the top of the transaction list.

b. Click the drop down menu on the Sort By field and select the transaction options needed.

c. Click the Filters option, select one of the Transaction Types OR enter a Date Range OR enter minimum/maximum transaction amounts.

Q) How do I see all of my account transactions?

A) Click on any account. Transactions will appear with Pending transactions displayed first, followed by the newest to oldest transactions. You can display additional transactions by clicking the "Load More" link at the bottom of the transaction list.

Q) How do I see a quick peek of my account information?

A) Click the Show more link on the bottom left of each account, the current and available balances, along with the last 5 transactions that are either Pending or Posted to your account. You can also access your eStatement or make a Transfer from this window. Click the "X" to close the slide out window.

Q) How do I display a check image?

A) Click the right arrow that appears at the end of the transaction. Transaction details, along with any item image will appear.

Q) How do I change the My Accounts view from individual cards for each account to a list of accounts?

A) Just above the total of your Internal Accounts are two icons, one that looks like 4 squares (this displays accounts as individual cards) and one that looks like a list (this displays accounts in a list view). Click the appropriate icon for the view you desire. The list view will provide an ellipsis icon (three dots) at the end of each account that will allow you to select either Transfers or eStatements.

Q) How do I change my greeting name?

A) Click the Customize Home Screen link on the top right of the screen. Update the Name field as needed. You can also change the Bill Pay/Budget/Spending widgets to display in an expanded or collapsed format by using the favorites (heart link).

Q) How do I download transactions?

A) Click on the appropriate account. Ensure the transactions you want to download displayed by using the Sort By or Filters options. Click the Down Arrow icon at the top of the transaction list and select the format of the transaction file that is appropriate. You can download to an Excel file (csv), Quicken (QFX), QuickBooks (QBO) or Open Financial Exchange (OFX) formats.

Q) How do I display my full account number or other details?

A) Click on any account. Click the Account Details link towards the top of the screen.