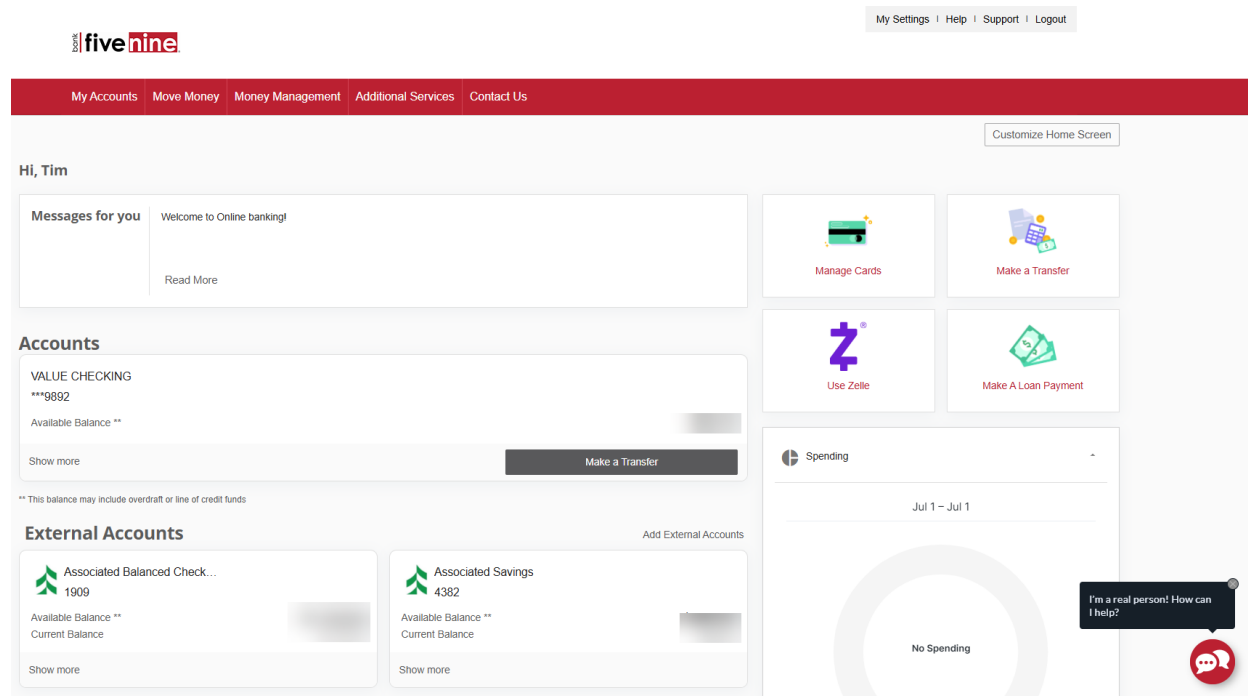




## The Next Generation of Online Banking

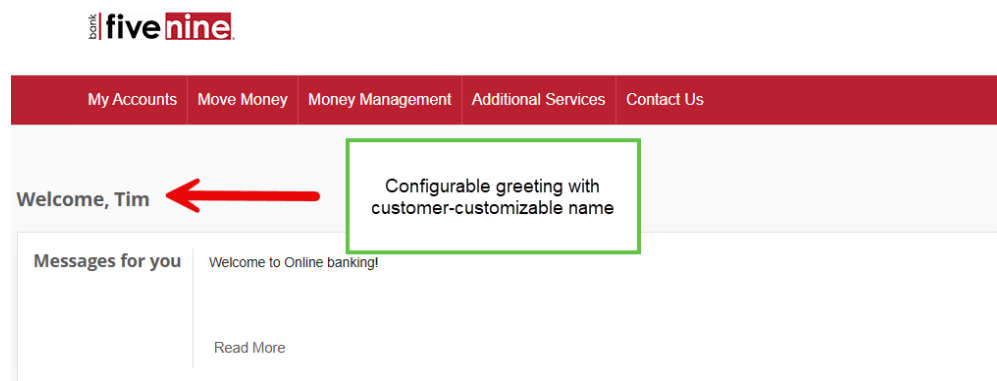
### Modern, intuitive & customizable

Within online banking, you can customize your on-screen greeting name, tag favorite accounts and create a favorites grouping, set what accounts to show in what order, switch views, and manage what's visible. This upgrade also updates the look and feel to a fresh, modern design.



### Custom Greeting

The greeting of the new Home Page is customizable. Your name, as set in your preferences, follows the greeting.



## My Accounts

The new My Accounts section of the Home Page neatly lays out all the essential information about your accounts in a clean, tile format.

The screenshot displays the 'Accounts' section of a banking interface. It features a summary of account types and a grid of individual account tiles. Red arrows and text annotations highlight key features:

- Click account name to navigate to transaction history page:** Points to the 'Simulator Checking' account name.
- Configurable buttons by account category:** Points to the 'Pay' button on the '64 Credit STM LPAY0' tile.
- Favorite an account:** Points to the heart icon on the 'Simulator Credit Card' tile.
- Due date/Past due alerts:** Points to the 'Due 10/15/24' alert on the 'Simulator Loan' tile.
- Quick view of account details (Quick Peek):** Points to the 'Show more' link on the 'Certificate of Deposit Account' tile.

**Accounts Summary:**

Account Type	Balance
Total Loan Accounts	\$1,008,186.72
Total Investment Accounts	\$21,474,836.47
Total Deposit Accounts	\$4,707,439.38

**Individual Account Tiles:**

- Simulator Checking (\*\*\*\*0001):** Available Balance \*\* \$150,585.69. Buttons: Show more, Statements, Transfer.
- Simulator Savings (\*\*\*\*0002):** Available Balance \*\* \$4,569,391.78. Button: Show more.
- 64 Credit STM LPAY0 (\*\*\*\*9121):** Outstanding Balance \$50,740.73, Available Credit \$50,740.73. Buttons: Show more, Statements, Pay.
- Simulator Credit Card (\*\*\*\*0004):** Outstanding Balance \$11,494.22, Available Credit \$11,494.22. Buttons: Show more, Statements, Pay.
- Simulator Loan (\*\*\*\*0005):** Balance \$945,951.77. Alert: Due 10/15/24. Button: Show more.
- Certificate of Deposit Account (\*\*\*\*0007):** Balance \$21,474,836.47. Button: Show more.

\*\* This balance may include overdraft or line of credit funds

All your accounts are displayed with access to the transactions page by clicking the **account name**. A quick look at additional details is accessed from the **Show More** link.

This screenshot shows the 'VALUE CHECKING' account details and transaction history. A red arrow points from the 'Show more' link in the 'Accounts' section to the 'Recent Transactions' table.

**VALUE CHECKING \*\*\*\*9892**

Available Balance \*\*  
Current Balance

**Recent Transactions**

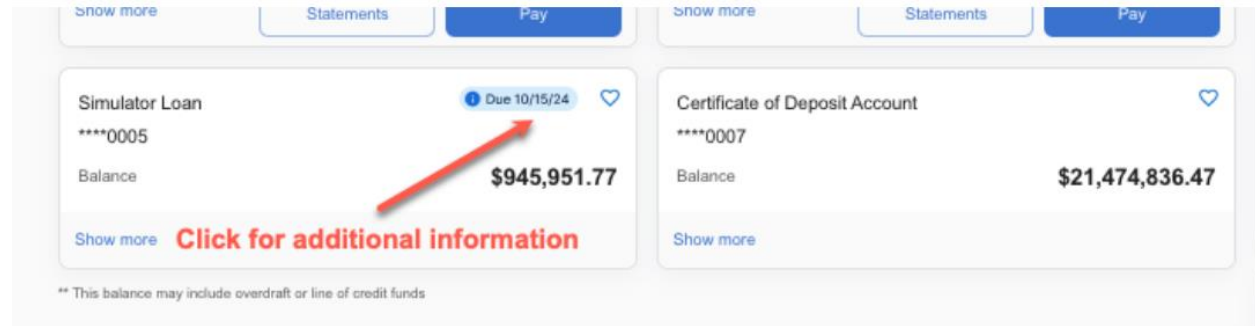
Date	Description	Amount
Pending	ACH ManagerBank Five Nine	\$40.00
Jun 2, 2025	Bank Five Nine BYOD	\$40.00
May 1, 2025	Bank Five Nine BYOD	\$40.00

**Make a Transfer**

\*\* This balance may include overdraft or line of credit funds

## Loan Information

Information and alerts related to loan payments and current status display as part of the account tile. Click the **Due Date/Past Due notification** to access a page with more detailed information about the account. If you are using a web browser, hovering over these areas will also display additional details.



## Home Screen Settings

The Home Screen Settings button in the top right corner of the home page will open a slide out with several options:

- Update greeting name to be displayed on the home page (note: this does not change your name in any other location within online banking)
- Manage widgets – turn visibility on/off for individual widgets (tiles), favorite widgets (tiles), reorder widgets (tiles)
- Navigate to the account preferences page (where account-level ordering/renaming/show/hide is located)

The selections that you make in the Home Screen Settings will be saved and will apply each time you log in.

Home Screen Settings

×

Greeting Name

Name

Tim

Widget Wallet

≡

Finance Manager

♡

≡

Spending

♡

≡

Pay Bills

♡

≡

Credit Score

♡

≡

Goal Builder

♡

Account Preferences

↗

Cancel

Save

I'm a real person! How can I help?

Transaction History

While the My Accounts section of the home page offers a brief overview of account status, details of transactions are available for each account by clicking the **account title**:

<div>VALUE CHECKING ***9892</div> <div><div>Switch Account</div><div>Account Details</div></div>		Available Balance	Balance
<div><div>Search</div><div>Sort By DATE (Newest)</div><div>Filters</div><div><div></div><div></div></div></div>			
Showing all transactions for 'All Transaction Types, 06/01/2025 to 07/01/2025'			
DATE	Description	Amount	Balance
Pending	ACH ManagerBank Five Nine	\$40.00	-
Jun 2, 2025	Bank Five Nine BYOD	\$40.00	\$82.18
Load More			

Using the tools and information on this page makes account management easy. Account details, balances, statements, transfers, and transaction information are all available in a clean, easy-to-read format. The page also houses many valuable features:

## Additional Account Details

Details of an account can be called up from the Transaction Details page by clicking the **Show Account Details** button.

My Settings | Help | Support | Logout

My Accounts | Move Money | Money Management | Additional Services | Contact Us

### Account History

**VALUE CHECKING \*\*\*9892**  
[Switch Account](#) [Account Details](#)

**Available Balance**  
**\$122.18**

**Balance**  
**\$82.18**

Sort By: DATE (Newest) Filters

Showing all transactions for 'All Transaction Types, 06/01/2025 to 07/01/2025'

DATE	Description
Pending	ACH ManagerBank Five Nine
Jun 2, 2025	Bank Five Nine BYOD

[Load More](#)

**VALUE CHECKING \*\*\*9892** ×

Account Number	4209892 <span>📋</span>
Routing Number	075902421 <span>📋</span>
Available Balance	\$122.18
Balance	\$82.18
Account Type	Checking
Account Status	Open
Accrued Interest	\$0.00
Interest Rate	0.000%
Interest YTD	\$0.00
Prior Year Interest	\$0.00

## New Search and Sort

The Transaction History page now offers more powerful search and sort capabilities, providing you with easy access to transaction details based on search criteria, as well as print and download capabilities.

Search transactions by entering a full or partial **Description**, **Amount** or **Balance**:

[Switch Account](#) [Account Details](#)

**Search terms and results**

× Sort By: DATE (Newest) Filters Print Download

Showing 1 out of 2 transactions for 'ACH, All Transaction Types, 06/01/2025 to 07/01/2025'

DATE	Description	Amount	Balance
Pending	ACH ManagerBank Five Nine	\$40.00	-

[Load More](#)

Filter results by **Date, Amount, Description** or **Category**, in ascending or descending value:

Available Balance	Balance
-------------------	---------

×

Sort By  
DATE (Newest) ▾

Filters

Print

/2025'			
		Amount	Balance
		\$40.00	-
	Load More		

DATE

Oldest ☐

Newest ☒

Amount

Lowest ☐

Highest ☐

Description

A - Z ☐

Z - A ☐

Filter transactions based on **Transaction Type, Date Range, or Transaction Amount**:

Accounts | Move Money | Money Management | Additional Services | Contact Us

History

CHECKING \*\*\*9892

Account Details

Available Balance

Balance

×

Sort By  
DATE (Newest) ▾

Filters

of 2 transactions for ACH, Deposits, 06/01/2025 to 07/01/2025

Description
ACH ManagerBank Five Nine

You've reached the end of your transaction history. Click here to search window.

Filter options

×

Transaction Type

☒ Deposits ☐ Withdrawals

Date Range

Start Date 06/01/2025

End Date 07/01/2025

Transaction Amount

Minimum \$ 0.00

Maximum \$ 0.00

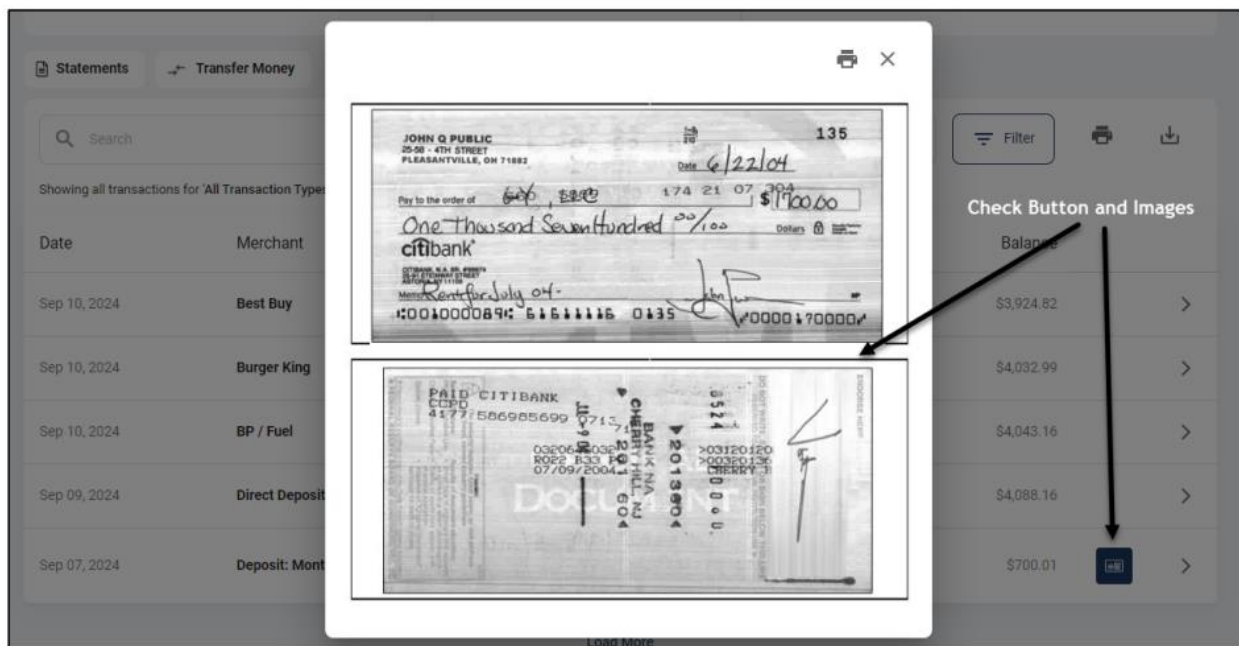
Reset All

Apply

Filter options and result

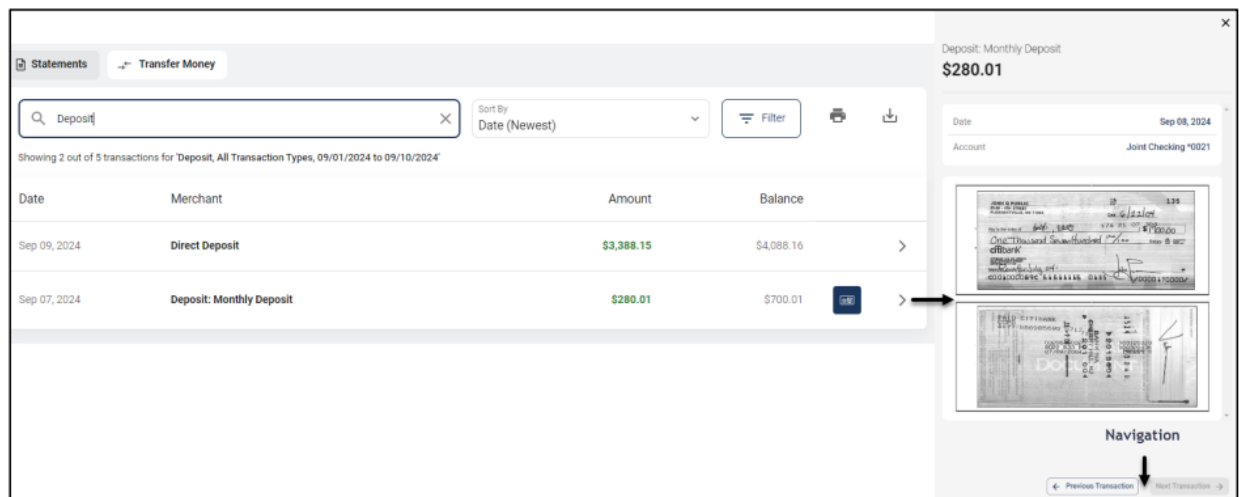
## Transaction-Related Images

Images of paper checks or deposit slips for any transaction are available with one click from the Transaction History page:



## Transaction Details

Like the Recent Transactions tile of the Home Page, clicking the **right arrow** on any transaction will display details including payee, amount, date, and any deposit slip or check images associated with the transaction.



Once in the details screen, clicking the **Previous Transaction** and **Next Transaction** buttons will navigate through the displayed list.

## Switching Accounts

Switching among accounts on the Transaction Details page is quick and easy; select the “switch account” button and then select the account from the drop-down list.

