# MODERN AND RESPONSIVE

Consumer Online Banking has a sleek, updated interface that works on your desktop, laptop, tablet or cell phone with a standard browser — giving you freedom to do your banking wherever and whenever. In addition, your existing mobile app. continues to be available and provides your optimal experience for banking on a mobile device.

# LOGIN AND AUTHENTICATION

You will continue to access the site using the existing URL address and we're using your existing ID and password and authentication technology to continue to keep your online sessions safe and secure. Additionally, IDs are no longer case sensitive, and you may be prompted to update your ID on your initial login attempt to the new site. Also, if you login from a device or location that is not recognized then you may be required to confirm your identity through a one-time PIN code.

## **UPDATED MENUS**

Watch for updated menu names to navigate to the features you commonly use such as Accounts, Move Money, Documents, Secure Messaging, and Self-Service.

# ACCOUNTS OVERVIEW

The Account Overview page is the first page you'll see after signing on to Consumer Online Banking. This page offers distinct formats designed to give you the best view of your accounts.

### Card/Tile View

Each account is presented as a card/tile that includes balance information with links to related tasks at the bottom of the card/tile.

You can change to the list view by clicking the list view icon ert ert ert.









#### **List View**

Each account is presented as a row in a table that includes balance information with links to related tasks on the right end of the row.

becking-0/1/	\$9 115 /9	\$9 115 /9	$\rightleftharpoons$ Transfer
0414	Available Balance	Current Balance	Documents

# **DOCUMENT DELIVERY**

Choose your statement delivery preferences through the **Delivery Settings** tab on the Documents page.

Docι	umen	ts
State	ments	Delivery Settings
Vie Stater	w nent	

## **DOWNLOAD REQUESTS**

Under the **Accounts - Reports Menu** is where you will request downloads and reports. Now your download requests can be for an unlimited amount of transaction history without constraints on the number of completed transactions or activity period (for example you can request an entire tax year). Additionally, you're your download requests that retrieve large sets of activity data will automatically process in the background and allow you to receive an optional email alert when the download file is ready to be accessed while you continue to use other features throughout the site.

## **MOVE MONEY**

The **Move Money** menu is where you will make internal and external transfers, pay bills, or pay other people.



## **Transfer**

Select the **Transfer** link to make an internal or external transfer between your accounts. Add new external bank accounts to transfer money with and to view your prior transfer activity.

Fis	// Digital One Accounts Move Money Self Service Tools	
	Transfer	
	Make Transfer Activity History Manage Templates Manage Accounts	
	Retail user - this is a header message displaying on the make transfer at the 2018.01 level verify this is displaying in full sentence on the make transfer page	
	Transfer From *	
	Transfer To +	
	⊕ Add Accounts	
	Amount	
	Description (Optional)	
	Financy Once +	
	Transfer Dates	
	When would you like the transfers to start?	
	Transfer Now	
	() Select Transfer Date	
	Continue	



## Loan Payment

If you have loans with our institution, then use the **Loan Payment** link to draw on a loan or to make a payment to a loan.

Fis	Digital One Accounts Move Money Self Service Tools	
	Loan Payment	
	Make Payment Activity History Manage Templates Manage Accounts	
	Transfer From +	
	Transfer To *	
	⊕ Add Accounts	
	Amount	
	Description (Optional)	
	Frequency Once +	
	Transfer Dates	
	When would you like the transfers to start?	
	① Transfer Now	
	O Select Transfer Date	
	Critica	



### **Retail Bill Pay**

To pay bills, add new payees and see prior bill payment activity then select the **Retail Bill Pay link**. As part of migrating, the existing payees and payments you had set up will port over to the new banking experience.

FIS // Digital One Accounts	Move Money Self Service Tools	Sign Out
Retail Bill Pay		
	Pry someone new       Mult Pry       Single Pry         Ver       K1       Ford payer         A An approved funding account is sequeded to make a payment Pease contact continer support.       Execution Labelacce         Pry. JP       Common Duet +       Labit scheduled         Total:       Betting       Sammant         One       Continue all payments       Annum	



## SELF SERVICE SELF ADMINISTRATION

**Self Administration** is where you will manage your password, email, telephone numbers, and username.

Self Administration	
Change Password Personal Preferences Change Username	
our password was last changed on September 21, 2022	
urrent Password	Ø
ew Password	Ø
<ul> <li>The new password must contain 8 - 64 characters.</li> <li>The new password must contain 1 upper case letter, 1 lower case letter, 1 number, 1 of the following special characters ! @ # \$ % ^ &amp; * , . &lt; &gt;</li> <li>The new password must be different from the last 1 previously created password or passwords.</li> </ul>	
onfirm Password	Ø
Update Password Cancel	Ø



### **ALERTS**

Your contact information and alert quiet time can be viewed and changed through the **Show Contact Information** link at the top of the page. Conversely, the information can be hidden by clicking the **Hide Contact Information** link. A **Yes/No** slide button allows you to easily subscribe to or unsubscribe from certain alerts.

how Contact Information			
ccounts Checking-0414 - Available \$9,	115.49 👻		
Account Transfer Alerts			
Daily or Weekly Transfer Su	mmary (j)	Yes 🗸	
Frequency	*		
Deliver to:			
Primary Email: katie.use	er@email.com		
Recurring or Scheduled Tra	nsfer n Days in Advance 🧻	No	
Number of Days			

Bill Payment alerts are accessed through the **Bill Payment link – Resources tab – Alert Preferences link**.

Alert Preferences			
Email address: Email format:	heather.roesler@fisglobal.com Text ✓		
Security		Email	
Important Bill Pay ca	ancellation information		11
Payee added			
Payee edited			
Payment			
Electronic funds trar	nsfer unsuccessful		
Electronic funds trar	nsfer unsuccessful		
Payment successful			-
		Don't save changes	ave

### Account Maintenance

Use **Account Maintenance** to add or update the nicknames you use on your accounts. Additionally, if you want to control the display of an account use the **Hide/Show** tab to mark accounts to hide.

## **Consumer Online Banking Upgrade**



Edit Name       Mobile Banking       Hide/Show         Use Zelle?       Hide/Show         Vor Could Win \$1,000 In The GSB         WERRY MONEY         SWEEPSTAKES         Learn How	Account	Maintenanc	e	
Use Zelle <sup>®</sup> ? You Could Win \$1,000 In The GSB MERRY MONEY SWEEPSTAKES Learn How Account REGULAR CHECKING-1501 - Available \$691.74	Edit Name	Mobile Banking	Hide/Show	
REGULAR CHECKING-1501 - Available \$691.74	Use Z You Could Win \$1 MERRY SWEEPS Learn	He <sup>®</sup> ? MONEY STAKES How		
Account Name Dad's Daily Checking Account	REGULAR CHEC	KING-1501 - Available	\$691.74	
Dadis Daily Checking Account	Account Name	king Assaunt		
	Dadis Dally Chec	King Account		
	Submit			
Submit				
Submit				
Submit				

#### **SECURE MESSAGING**

The Secure Messaging page is comprised of the following tabs: Compose, Incoming, Sent, Contact Information, Archived, and Service Requests.

Use **Compose** to reach out to us about any of your Consumer Online Banking questions or concerns. Use **Incoming** to view any of the messages we've sent to you. Use **Sent** to view any of the messages you've sent to us. The Archived tab includes any of the messages from us that you've chosen to keep.

## Consumer Online Banking Upgrade



Secure M	Secure Messaging				
Compose	Incoming	Sent	Archived	Service Requests	
Message Topic					•
Subject					
Message					
					ĥ
	$\frown$				
Send	Cancel				

The **Contact Information** tab is where you will find our contact information.



**Service Requests** tab is where you will go to access forms for requesting actions like changing your address, ordering checks, etc.

ecure Messaging		
Compose Incoming Sent Archived Service	Requests	
Reorder Deposit Books Request deposit book orders/re-orders for your accounts.	Transfer File	Add Joint Owner Add a joint owner to one of your accounts.
CD Distribution Submit distribution instructions for a maturing CD.	CD Purchase Purchase a new CD from one of our many options.	Change of Address Submit A request to change your account/personal address.
Debit Card Request a new or replacement debit card.	IRA Distribution Submit distribution instructions for an IRA account.	Lost/Stolen Card Report a lost or stolen debit/credit card.
New Subaccount Add a new subaccount.	Overdraft Protection Request overdraft protection for your accounts.	Payroll Deduction Request payroll deductions from your accounts.
Savings Bonds Purchase savings bonds from one of our many options.		ATM/Debit Card Overdraft Coverage (Reg-E) Select Accounts for ATM/Debit Card Overdraft Coverage.

### **CONTACT INFORMATION**

If you have any questions or concerns about this upgrade to your Consumer Online Banking experience, please call 702.780.7700 or email customerservice@lexiconbank.com.