



Online Banking Guide

This manual was last revised on 11/21/2025. (ALG)

Contents

ONLINE BANKING GUIDE	6
Login	6
Accessing Online Banking for the First Time:	6
ACCOUNTS	10
Account Summary	10
Account Details & Transaction History	12
Card Details	13
Blocking a Card Account:	14
Unblocking a Card Account:	15
Adding a Schedule Block by Time:	16
Viewing or Editing a Scheduled Block:	18
Removing a Scheduled Block:	19
Transaction Search	20
Performing a Transaction Search:	21
Stop Payments	22
Initiating a Stop Payment Request:	22
Integrated Statements/Notices	24
Viewing a Statement:	24
GoStatements/GoNotices	25
Viewing Statements:	25
Registering to Receive Paperless Statements:	27
Account Alerts	31
Creating a New Alert:	32
Editing an Alert:	33
Deleting an Alert:	33
Editing Text Alert Times:	33
Reordering Cards	34
Reordering a Debit Card:	34
Card Alerts	39
Creating a New Card Alert Contact Method:	39
Creating a New Card Alert:	40
Editing a Card Alert:	40
Editing Card Alert Delivery Times:	40
Travel Indicators	42

Creating a Travel Indicator:	42
Editing a Travel Indicator:	43
TRANSFERS	44
External Transfer Accounts.....	44
Creating a New External Transfer Account using ACH Micro Deposits:	46
Creating a New External Transfer Account using Plaid:.....	48
Transfer Funds.....	49
Creating a New Transfer:.....	49
Transfers	51
BILL PAYMENTS.....	53
Bill Pay	53
Bill Pay Personal Info	53
Bill Pay Accounts.....	54
TEXT BANKING.....	54
Text Banking Setup	54
Setting up Text Banking:	55
Instructions	57
Unsubscribe.....	57
PREFERENCES.....	58
Customer Preferences	58
Contact/Authorization Method	59
Creating a New Contact Method:	59
Edit Login Name.....	62
Edit Password	63
Editing your Password:	63
Edit Customer Account Info	64
Editing Customer Account Information:	65
Edit Email Address	66
Account Settings	67
Opt In Agreements/Policies.....	69
CORRESPONDENCE	70
Recent Messages	70
Compose Message	71
LINKS	72

Links..... 72

Online Banking Guide

Login

New Users

Accessing Online Banking for the First Time:

1. Navigate to the Online Banking system via www.southwindbank.com.

The screenshot shows the Southwind Bank Online Banking login interface. At the top, there's a navigation bar with 'Good Afternoon', 'Home', 'Locations', and 'Sign In'. Below this is a banner featuring a sports car and the text 'MAKE YOUR DREAMS COME TRUE' with a 'dci.' logo and 'APPLY FOR A LOAN TODAY'. The main login area has two input fields: '*Login' with the text 'bhobbs' and '*Password' with masked characters '.....'. To the right of the password field is an eye icon. Below the password field is a 'Remember Me' checkbox. A large green 'Submit' button is at the bottom of the login fields. To the right of the login fields is a sidebar with links for 'Online Forms', 'On-Line Banking', 'Financial Tools', 'Annual Percentage Rate', 'Millionaire', 'Mortgage', and 'Mortgage Qualification'. At the bottom left of the login area are links for 'Forgot password?' and 'Not enrolled? Sign up now'. A disclaimer at the bottom states: 'The account information you are about to review is a history as of the bank's most recent update. Any transactions you create during this session are pending the bank's next update and are subject to any other activity in the corresponding account.' A 'Let's talk!' chat button is in the bottom right corner.

TIP: Check the Remember Me check box to save your Login name.

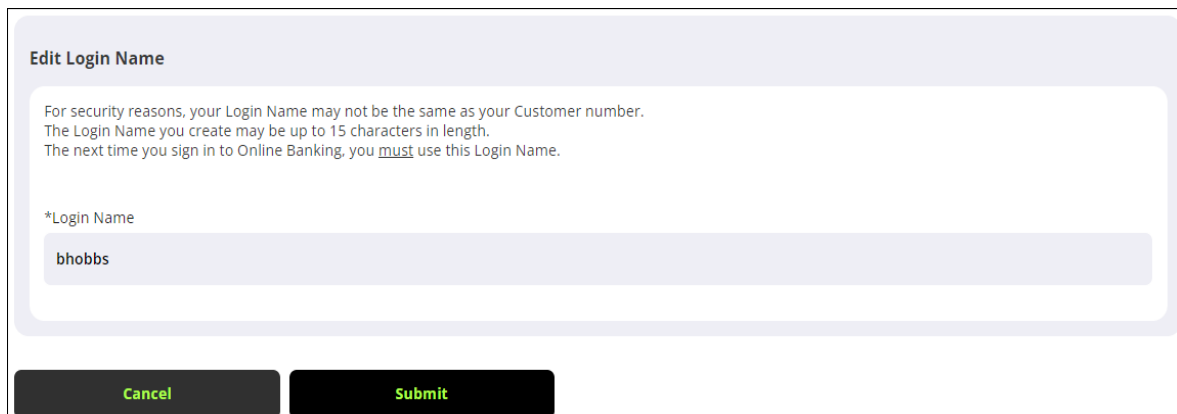
TIP: Click the icon to display or hide the typed password.

2. If you were an Online Banking user prior to conversion, use your previous login name to access the system. If you are a new Online Banking customer, click on New User.
3. Enter your assigned temporary password.

NOTES:

- This is typically the last six of your social security number or TIN.
 - A warning message will display under the Password field if Caps lock is on.
4. Click **Submit**.

5. If prompted, create a new login name.



Edit Login Name

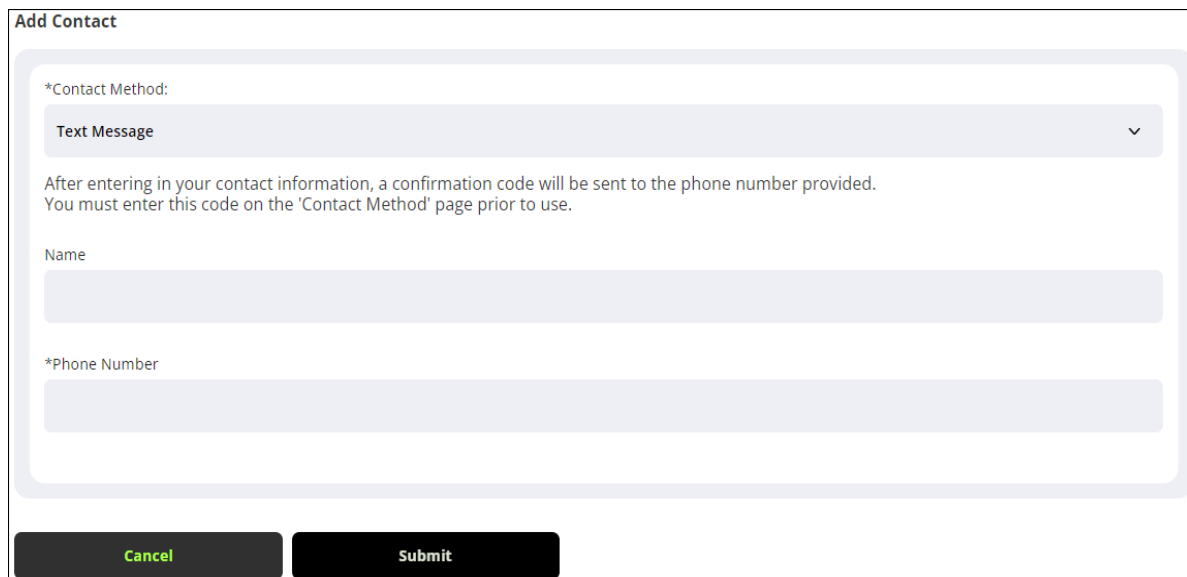
For security reasons, your Login Name may not be the same as your Customer number.
The Login Name you create may be up to 15 characters in length.
The next time you sign in to Online Banking, you must use this Login Name.

*Login Name

bhobbs

Cancel Submit

6. Click **Submit**.
7. Provide a method for contact. This information will be used to send a confirmation code prior to login.
8. Select the type of contact method. *Options are:* SMS/Text or Email.
9. Enter a name for the contact method, optional.
10. Enter the mobile phone number or the email address.



Add Contact

*Contact Method:

Text Message

After entering in your contact information, a confirmation code will be sent to the phone number provided.
You must enter this code on the 'Contact Method' page prior to use.

Name

*Phone Number

Cancel Submit

11. Click **Submit**.

12. Enter the confirmation code received via SMS/Text or email. If needed, click **Resend** to receive a code again. (Check your spam/junk folder if you do not receive the email.)

Verify Contact

Please enter the confirmation code that was sent to the phone number you provided. (*****5396) If you did not receive the code click '[Resend](#)'.

*Code

543627

Cancel **Submit**

13. Click **Submit**.
14. If prompted, edit the password.
15. Enter the current password in the Current Password text box.
16. Enter a new password in the New Password text box.
17. Enter the same password in the Confirm New Password text box.

Edit Password

Password change required.

Your new password is case sensitive and may be any combination of letters, numbers, and keyboard characters. Your password must also meet the following requirements:
 Passwords must contain a minimum of 6 to a maximum of 44 characters

*Current Password

*New Password

*Confirm New Password

Cancel **Submit**

18. Click **Submit**.

19. If prompted, edit the email address. This is the email address used for notifications within the Online Banking system and when registering for online statements.
20. Enter the email address.
21. Select the checkbox to indicate if alerts should be sent to this email when secure messages are received.

Edit Email Info

By registering an email address you will be allowed to:

- Receive email notification for secure messages from the Bank
- Configure and receive email notifications
- Reset your own Online Banking password

*Email Address

☐ Send an alert to this address when I receive a secure message.

Cancel **Submit**

22. Click the applicable button to proceed. *Options are:*
 - **Cancel** – Select this option if you would not like to register your email address.
NOTE: *If an email address has not been configured prior to accessing statements, users will be redirected to the registration screen.*
 - **Submit** – Select this option to continue registering the email address.
23. Enter the confirmation code received via email. If needed, click **Resend** to receive a code again, or click **Reset** to enter a different email address.

Edit Email Info

Confirmation is required for your email address: kmcginnis@datacenterinc.com
If you have not yet received the email containing your confirmation code click 'Resend'.
If you would like to use a different email address, click 'Reset'.
Please note that it may take several minutes to receive the confirmation email.

*Confirmation Code

Reset **Resend** **Submit**

24. Click **Submit**.

Additional Login Prompts

Additional screens may appear during the login process if additional notices, policies, or agreements have been enabled.

Accounts

Account Summary

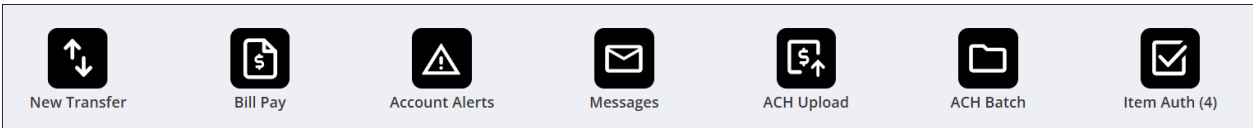
Accounts → Account Summary

The account summary screen is the landing page for the Online Banking system and displays a general overview of your accounts as well as links to frequently used screens.

Quick Actions

The Quick Actions menu will display on many of the account screens, allowing you to quickly navigate to popular screens.

NOTE: *The options that display vary.*



New Transfer	Navigates to the Transfers screen.
Bill Pay	Navigates directly to the Bill Pay website.
Account Alerts	Navigates to the Alerts screen.
Messages	Navigates to the Messages Inbox.
ACH Upload	Navigates to the ACH File Upload screen.
ACH Batch	Navigates to the ACH Batches screen to see a summary of batches created.

Item Auth(#) Navigates to the Cash Management Item Authorizations screen. The number in parentheses indicates the number of items awaiting authorization.

Account Summary

Accounts are organized in tabs based on the type.
NOTE: The options that display may vary.

Good Afternoon

HomeLocationsSign Out

MAKE YOUR DREAMS COME TRUE

APPLY FOR A LOAN TODAY

dcl

New Transfer

Bill Pay

Account Alerts

Messages

ACH Upload

ACH Batch

Account Summary

CheckingSavingsCDLoanCard

Jason's Checking1237CHK\$2,420.76Available

Jessica's Checking4001CHK\$3,136.90Available

8992CHK\$9,381.41Available

Total Checking Available\$14,939.07

Total Checking Current\$14,969.03

Account Summary

CheckingSavingsCDLoanCard

Jason's Checking1237CheckingAvailable\$2,420.76Current\$2,430.72Transactions

Jessica's4001CheckingAvailable\$3,136.90Current\$3,146.90Transactions

8992CheckingAvailable\$9,381.41Current\$9,391.41Transactions

TIP: Use the icons to switch between the tile and list view.

TIP: Click the account or the Transactions link to navigate to the Account Details screen.

Account Details & Transaction History

Accounts → Account Summary → Select Account or click Transactions link

The Accounts Details and Transaction History screen displays detailed account information and transaction history for the selected account. Sort options are available by clicking in the *Sort By* section. Use the *Search* section to search for transactions using key words or amounts.

Change

Displays a list of accounts the customer has access to and allows them to quickly switch to another account on this screen.

More Details

Displays additional details regarding the selected account.

Filter

Opens a new window allowing you to filter by All Transactions, Deposits, Checks/Withdrawals, and/or a date range.

Account Details

Charles Checking ***** Checking

Available **\$152,442.69**

Current \$152,442.69

Last Deposit Amount \$0.00

Last Statement Balance \$0.00

More Details

Change

Transaction History

30 Days 15 Days 7 Days Pending Future

Search

Filter

Sort by: Select Sort Order

Show: 25 of 87

Point Of Sale Debit
Amount
BALANCE

Check Received 2,500.00

Amount
BALANCE

Pending
(\$237.81)

3/4/2025

\$2,000.00

\$152,251.30

TIP: Quickly filter the transaction history displayed by selecting a pre-set filter.

TIP: Click  to see the image associated with the transaction.

Card Details

Accounts → Account Summary → Card Tab

The screenshot shows the 'Account Summary' page with the 'Card' tab selected. It displays two debit cards. The first card, 'Jason's Card', has a status of 'Open' and an expiration date of 05/2028, with a 'Block' button. The second card has a status of 'Closed' and an expiration date of 05/2028, with an 'Unblock' button. A note at the bottom left states '* Balance as of 05/08/2012'.

Several card actions can be taken from the Card tab.

Activate

If your financial institution has enabled this feature, select **Activate** to activate your card. Once the card is activated, this button will no longer be displayed.

This screenshot shows a single debit card entry. The card number is 400000****0330, the status is 'Open', and the expiration date is 06/2027. An 'Activate' button is visible in the bottom left corner.

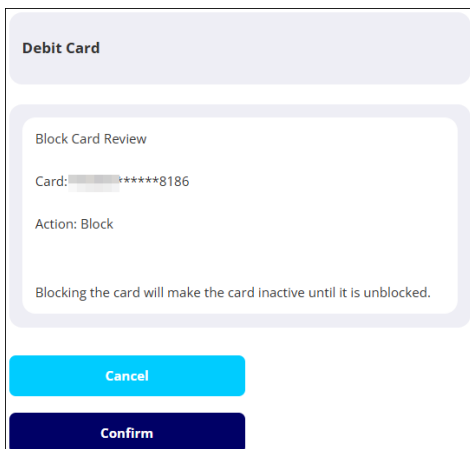
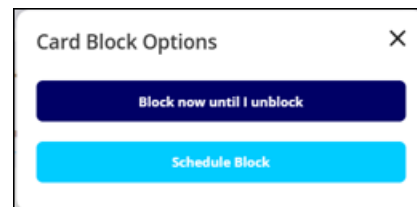
Block

If enabled by your financial institution, this feature allows you to block or unblock a card from being used.

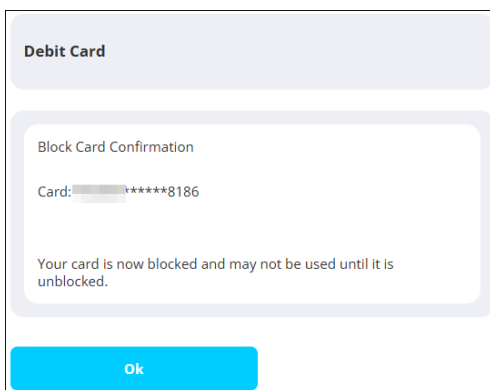
This screenshot shows a single debit card entry. The card number is 520286****4399, the status is 'Open', and the expiration date is 10/2023. A 'Block' button is visible in the bottom left corner.

Blocking a Card Account:

1. Navigate to the tab containing the card account. **Accounts** → **Account Summary** → **Card Tab or Favorite Tab**
2. Click **Block**.
3. If no blocks are currently set up, two options will display:
 - **Block now until I unblock** – This option will block the card from use until you unblock it.
 - **Schedule Block** – This option will allow you to set specific times each day that new card authorizations should be blocked.
4. Click **Block now until I unblock**.
5. A screen will display indicating the card will be inactive until it is unblocked. Click **Confirm** to continue or **Cancel** to cancel blocking the card account.



6. A confirmation screen will display. Click **OK**. The card will now display with an Unblock indicator.



Unblocking a Card Account:

1. Click **Unblock**.

Debit Card	Status: Closed 909110*****7321
Expiration: 05/2028	
Unblock	

2. Click **Confirm** to continue unblocking this card, making it active and ready for use.

Debit Card
Unblock Card Review
Card: *****8186
Action: Unblock
Unblocking this card will make the card active and ready for use.
Cancel
Confirm

3. A confirmation screen will display. Click **OK**.

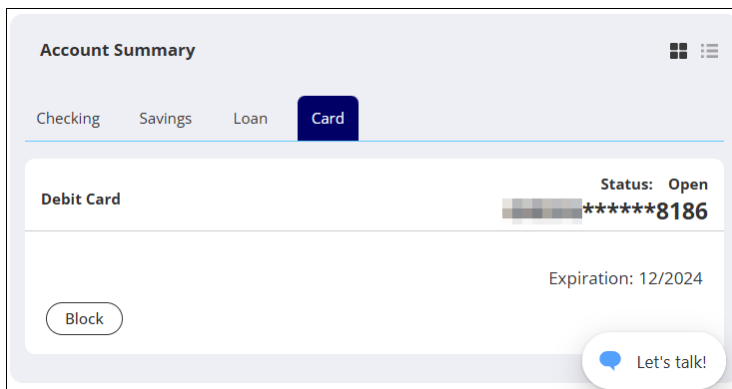
Debit Card
Unblock Card Confirmation
Card: *****8186
Your card is now active and may be used again.
Ok

Scheduled Blocks

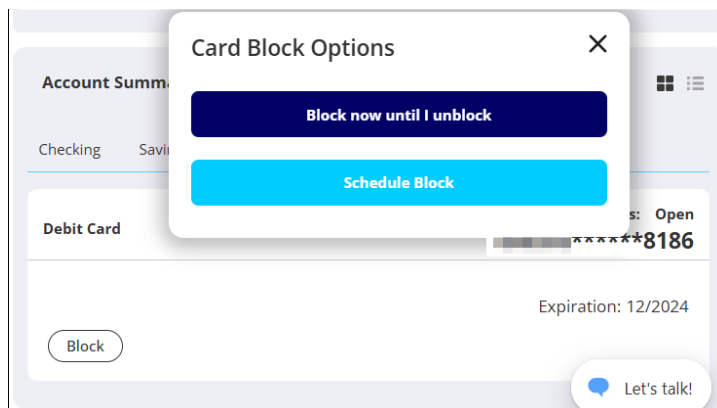
You will have the ability to schedule blocks on new preauthorized card transactions during set times each day.

Adding a Schedule Block by Time:

1. Navigate to the tab containing the card account. **Accounts** → **Account Summary** → **Card Tab or Favorite Tab**



2. Click **Block**.
3. If no blocks are currently set up, two options will display:
 - **Block now until I unblock** – This option will block the card from use until you unblock it.
 - **Schedule Block** – This option will allow you to set specific times each day that new card authorizations should be blocked.



4. Select **Schedule Block**.

5. Edit the time zone, if needed.
6. Indicate the start time each day to begin the block. Enter two digits for the hour and two digits for the minutes. For example: 7:00 should be entered as 07:00.
7. Indicate if the start time is AM or PM.
8. Indicate the time to end the block each day. Enter two digits for the hour and two digits for the minutes. For example, 6:30 should be entered as 06:30.
9. Indicate if the stop time is AM or PM.
10. Enter an ending date for the schedule. If no end date is selected, this schedule will recur daily until it is manually removed.
11. Click **Submit**.

Schedule Card Block

Card: *****8186

Time Zone
 Central Stand... ▼

Your card will be unavailable from

*Start Time(hh:mm)
 11:00 PM ▼

Until

*Stop Time(hh:mm)
 05:30 AM ▼

Recurring daily until

End Date
 4/30/2025 📅

If no end date is selected this will continue recurring daily

Cancel Submit

12. A confirmation screen will display with the details of your scheduled block. Click **Ok**.

Card Block Schedule

Card: *****8186

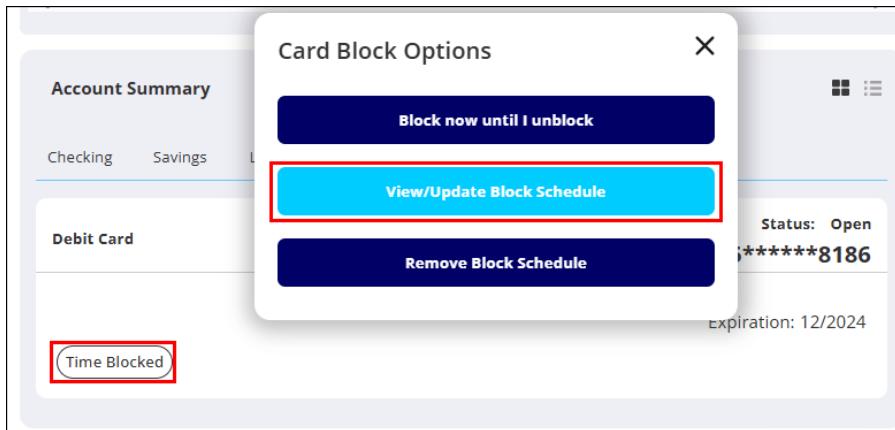
Scheduled card block requested 11:00 PM to 5:30 AM CT

Until: 04/30/2025

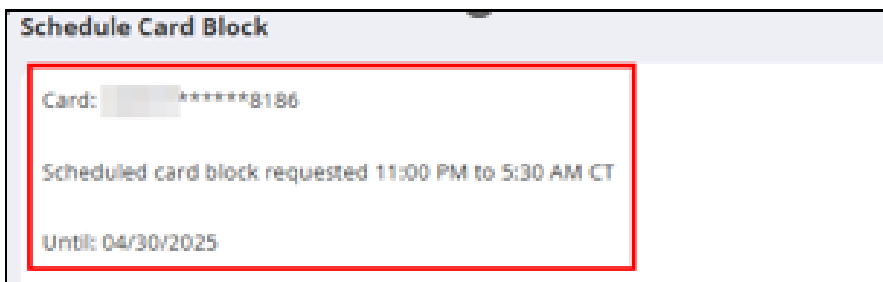
Ok

Viewing or Editing a Scheduled Block:

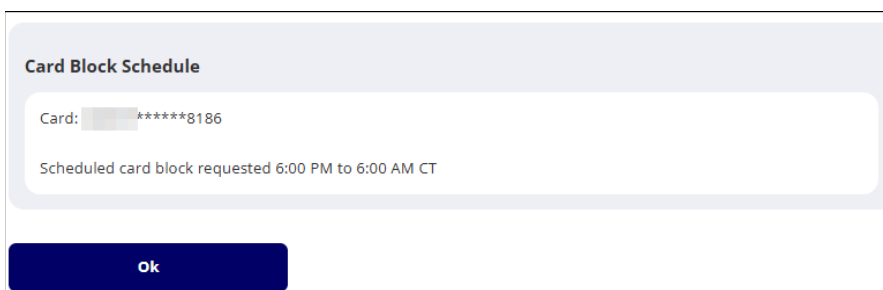
1. Click **Time Blocked** on the applicable debit card.



2. Select the **View/Update Block Schedule** option.
3. The Schedule Card Block screen will display with the current schedule and end date, if applicable, at the top of the screen.

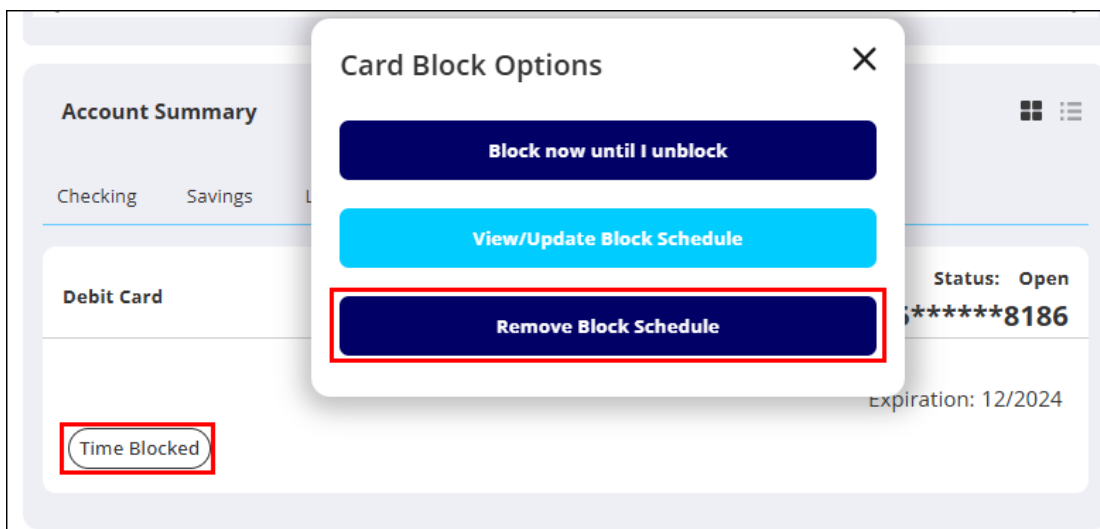


4. Modify the schedule as needed.
5. Click **Submit**.
6. The updated schedule will display. Click **OK**.

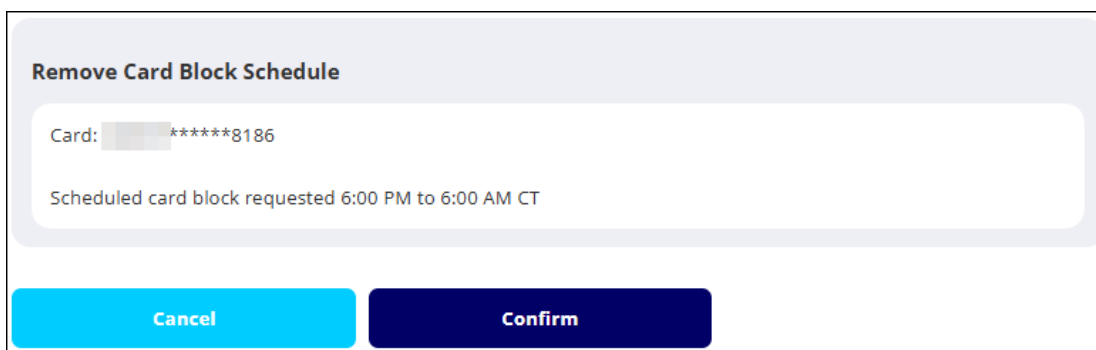


Removing a Scheduled Block:

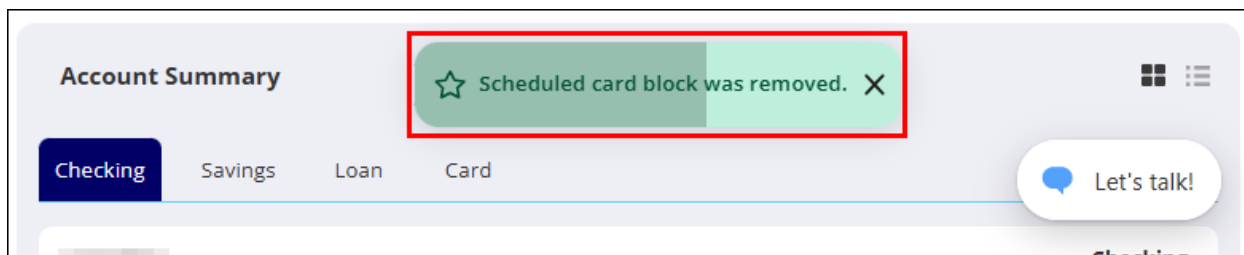
1. Click **Time Blocked** on the applicable debit card.



2. Select the **Remove Block Schedule** option.
3. A summary screen will display. Click **Confirm** to continue removing the scheduled blocked.



You will automatically be navigated back to the Account Summary screen. A message will briefly display indicating the scheduled card block was removed.



Transaction Search

Accounts → Transaction Search

The Transaction Search screen gives you the ability to filter transactions by date, check number, amount, category, or a combination of these filters.

Transaction Search

From Date

3/2/2024

To Date

4/2/2024

From Check #

To Check #

From Amount

To Amount

Checking

☐ All Checking accounts

☐ Jessica's Checking

☐ Jason's Checking

☐ 8992

Savings

☐ All Savings accounts

☐ Jason's Savings

☐ Jessica's Savings

CD

☐ All CD accounts

☐ Jason's IRA

☐ Jason's CD

Loan

☐ All Loan accounts

☐ Jeep Cherokee Loan

☐ Business Loan

☐ Home Loan - Escrow

Categories

Submit

Performing a Transaction Search:

1. Enter the Start and End date.
2. Enter the check number or range of check numbers.
3. Enter the amount or amount range.
4. Select the accounts to search.
5. Click **Categories** to view and select categories for the search.
6. Click **Submit**.

The transactions that fall within the search requirements display. The results can then be exported or printed, if needed.

Transaction Search Results

 Search

Sort by:

Select Sort Order

Images	Account	Date	Type	Description	Debits	Credits
	Charles Checking	10/30/2024	Deposit	Check Received 2,500.00		\$2,000.00
	Charles Checking	10/30/2024	Debit Card Payment	Signature Trans BIG O TIRES MYTOWN US	(\$32.72)	
	Charles Checking	10/30/2024	Debit Card Payment	Signature Trans FAMILY FEED BAG MYTOWN US	(\$28.78)	

Cancel

Export

Print All

Stop Payments

Accounts → Stop Payments

You can use the Stop Payments option to initiate a stop payment request directly within Online Banking. This screen can also be used to view and search for existing stop payment records entered by primary or secondary users.

Stop Payments

New Stop Payment Request

Search

Sort by: Select Sort Order

Show: 5 of 6

<

1

2

>

Date	Account	Payable To	Check#	Amount	Expiration Dates	Submitted By
10/03/2024	Jason's Checking	N/A	824 to 824	\$824.00	N/A	Sent To Bank bhobbs
08/16/2024	8992	N/A	500	\$100.00	N/A	Sent To Bank bhobbs
08/15/2024	Jason's Checking	N/A	2002	\$123.11	N/A	Sent To Bank bhobbs

Initiating a Stop Payment Request:

1. Navigate to the Stop Payments screen. **Accounts → Stop Payments**
2. Click **New Stop Payment Request**.
3. Choose the account number to place the stop payment on.
4. Enter the check amount, if known.
5. Enter the Low and High check numbers, as needed. If only one check was lost, enter the same check number in both fields.
6. Input the check date, which is required.
7. Enter the payable to field, if applicable.
8. Indicate the reason for the stop payment.
9. Add an optional comment.

New Stop Payment Request

*Account Checking Jason's Checking \$2,430.72	Check amount 750.00
*Low check number 521	High check number 521
*Check date 7/31/2024	Payable to ABC Grocery
Reason Lost Check	
Comment	

Cancel **Submit Stop Payment Request**

10. Click **Submit Stop Payment Request**.

A message will display, indicating the stop payment was submitted. Click **OK** to return to the Stop Payments screen.

Stop Payment Request Was Successfully Submitted

Account:	Jason's Checking
Low Check Number:	521
High Check Number:	521
Check Amount:	750.00
Check Date:	07/31/2019
Payable To:	ABC Grocery
Reason:	Lost Check

Ok

If the check has already been posted to your account, a message will display indicating that you must contact Southwind Bank for further assistance.

Stop Payment Request Failed: Check #70192 has already posted to your account, please contact your financial institution for further assistance.

Integrated Statements/Notices

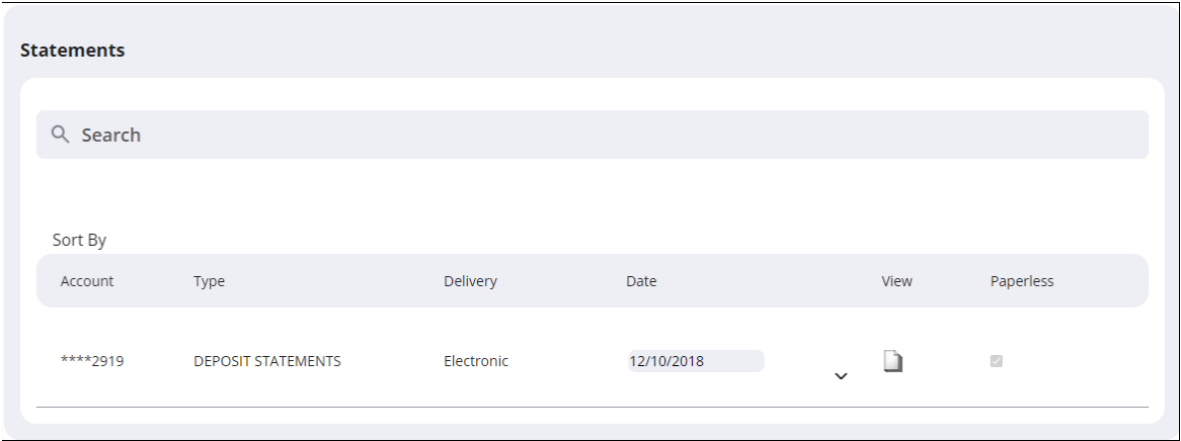
Accounts → View Statements and Notices

NOTE: The View Statements option may also be available on the Account Summary screen or on the Account Details screen.

Integrated Statements/Notices gives customers the ability to view statements and/or notices within Online Banking.

Viewing a Statement:

- 1. Select the date of the statement from the Date drop-down.
- 2. Click .
- 3. View, print, or save the statement as needed.



Account	Account number or account name indicated in the Account Settings.
Type	Type of statement or notice. Ex: Deposit, Loan, etc.
Delivery	Method for receiving the statements for the associated account. NOTE: The delivery type will always display Paper.
Date	Date of the statement that will display.
View	Click  to view a digital copy of the statement.

Paperless

Indicates the customer will receive electronic statements instead of paper statements for the associated account.

NOTE: This option is **not** available for Integrated Statements and Notices. These check boxes will be grayed out.

GoStatements/GoNotices

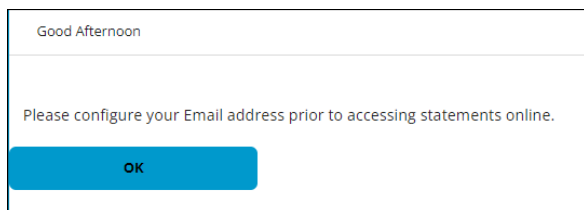
Accounts → View Statements and Notices

NOTE: The View Statements option may be available on the Account Summary screen or the Account Details screen.

GoStatements/GoNotices gives users the ability to view statements and/or notices within Online Banking along with the option of going paperless.

Viewing Statements:

1. If you have not configured your email address prior to accessing statements, you will receive the following message. (If an email address is registered, skip to step 6.)

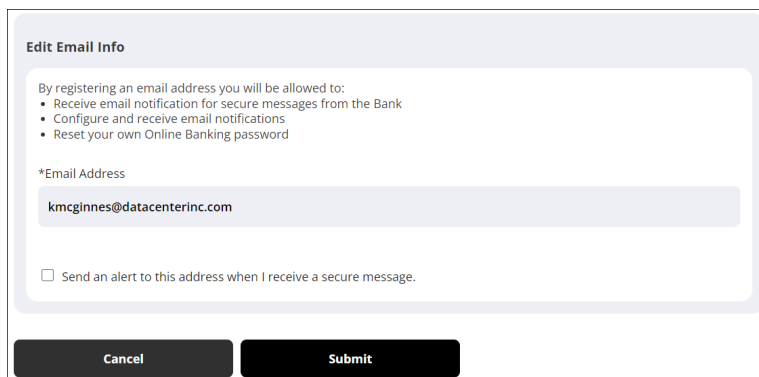


Good Afternoon

Please configure your Email address prior to accessing statements online.

OK

2. You should be automatically navigated to **Preferences → Update Email Address** to update the email address.



Edit Email Info

By registering an email address you will be allowed to:

- Receive email notification for secure messages from the Bank
- Configure and receive email notifications
- Reset your own Online Banking password

*Email Address

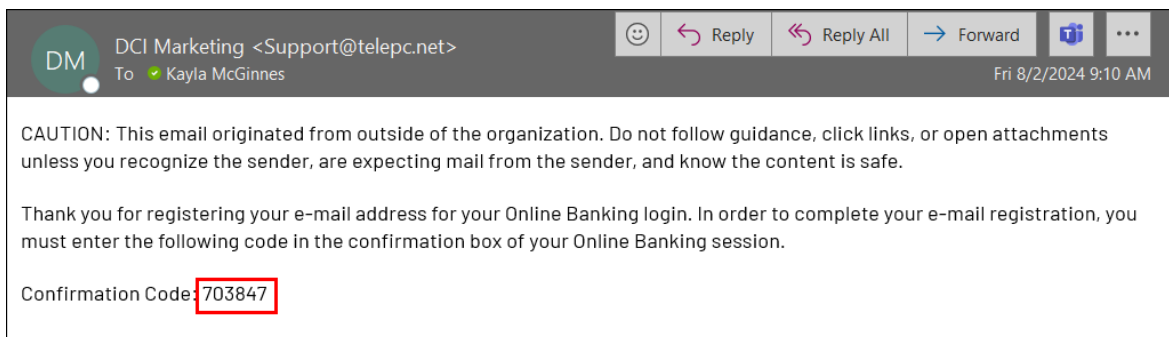
kmcglnnes@datacenterinc.com

☐ Send an alert to this address when I receive a secure message.

Cancel Submit

3. On the Edit Email Info screen, enter a valid email address and click **Submit**.

- An email is then sent with a confirmation code that will be used to configure the email.



- Enter the confirmation code and click **Submit**.

NOTE: You may be directed to the Customer Preferences page with a message indicating that the email address was successfully updated.

Edit Email Info

Confirmation is required for your email address: kmcginnes@datacenterinc.com
If you have not yet received the email containing your confirmation code click 'Resend'.
If you would like to use a different email address, click 'Reset'.
Please note that it may take several minutes to receive the confirmation email.

*Confirmation Code

703847

Reset Resend Submit

- Navigate back to the statements and notices page, if not already automatically directed. **Accounts → View Statements and Notices**
- Select the date of the statement from the Date drop-down.
- Click .
- View, print, or save the statement, as needed.

Statements

Search

Sort By

Account	Type	Delivery	Date	View	Paperless
****7704	DEPOSIT STATEMENTS	Paper	11/16/2018		☐

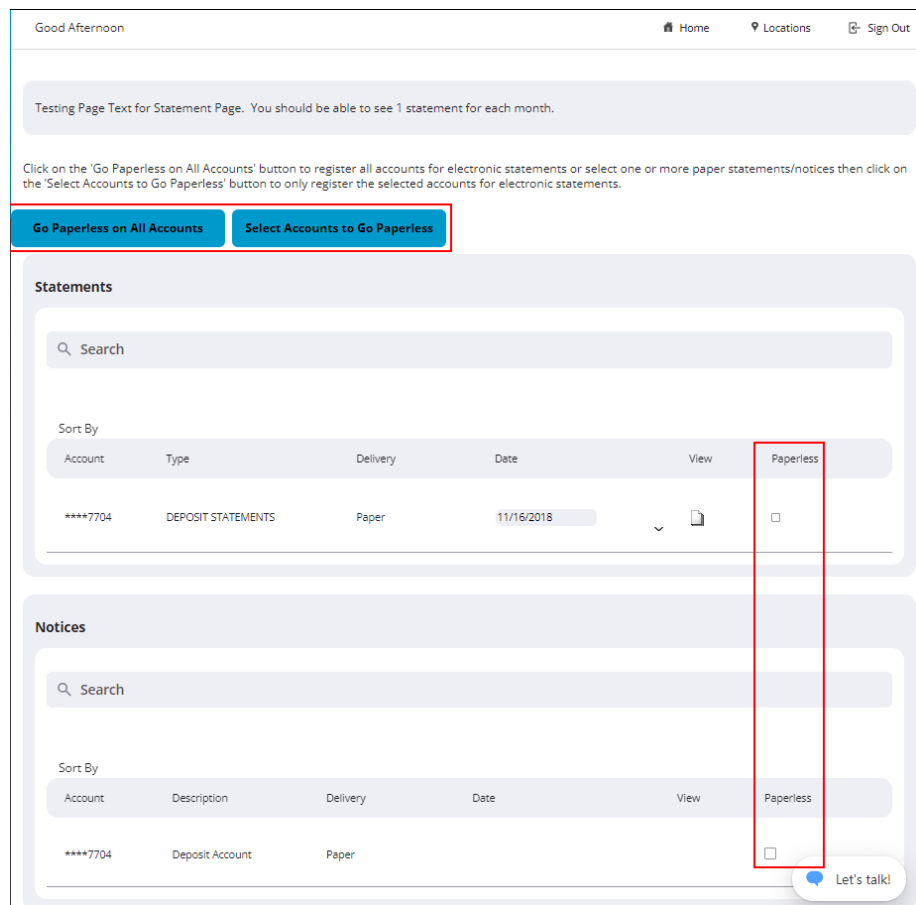
Account

Account number or account name indicated in the Account Settings.

Type	Type of statement or notice. Ex: Deposit, Loan, etc.
Delivery	Method for receiving the statements for the associated account.
Date	Date of the statement that will display.
View	Click  to view a digital copy of the statement.
Paperless	Indicates the customer will receive electronic statements instead of paper statements for the associated account. NOTE: <i>Customers must complete the registration for paperless statements.</i>

Registering to Receive Paperless Statements:

1. Navigate to **Accounts → View Statements and Notices.**



Good Afternoon

Home Locations Sign Out

Testing Page Text for Statement Page. You should be able to see 1 statement for each month.

Click on the 'Go Paperless on All Accounts' button to register all accounts for electronic statements or select one or more paper statements/notices then click on the 'Select Accounts to Go Paperless' button to only register the selected accounts for electronic statements.

Go Paperless on All Accounts Select Accounts to Go Paperless

Statements

Search

Sort By

Account	Type	Delivery	Date	View	Paperless
****7704	DEPOSIT STATEMENTS	Paper	11/16/2018		☐

Notices

Search

Sort By

Account	Description	Delivery	Date	View	Paperless
****7704	Deposit Account	Paper			☐

Let's talk!

2. To go paperless on all accounts, click **Go Paperless on All Accounts**. If only certain accounts should go paperless, check the Paperless checkbox next to the appropriate account(s) and then click **Select Accounts to Go Paperless**.

NOTES:

- Any previously registered accounts display a Delivery method of "Electronic" with the Paperless box checked. Accounts that have not been registered display a Delivery method of "Paper," with the Paperless box not checked. Paperless accounts can be switched back to Paper at any time by Southwind Bank.
- Current GoStatements/GoNotices customers that want to register a new account, simply need to check the Paperless check box for the accounts to register and then click **Go Paperless**. Since the customer is already registered, the terms and conditions will not be reviewed.
- The customer can view statements, notices, year-end notices, and bank documents in separate sections. To view an item, select the appropriate date from the drop-down if applicable, and then click .
- Integrated GoStatements/GoNotices will display the last 24 statements (monthly, quarterly, or weekly statements). 90 statements will display if the statements are set to days. Yearend notices will be available for 7 years.

Notification Emails

Customers will receive the following email notifications when new statements or notices are available to be viewed.

- If the customer has *more* than six statements and/or notices available for viewing, extra verbiage "(and additional accounts not listed here)" will be printed at the bottom of the "Account Numbers Ending In" list.

From: SOUTHWIND BANK <DONOTREPLY@datacenterinc.com>
Sent: Friday, August 14, 2026 9:07 PM
To:
Subject: Account Statement Notification



Statement Date: 08/14/2026

Account numbers ending in:
XXXXXXXX 1234
XXXXXXXX 5678

Your Account Statement for 08/14/2026 is now available for viewing online.

You may also view your disclosure(s) on the Southwind Bank eStatements page.

Please visit www.southwindbank.com to view your statement.

If you have any questions, please contact us:

By Phone: (785)885-4234
By Email: customerservice@southwindbank.com
By Mail: SOUTHWIND BANK
702 N. 2ND STREET
P O BOX 40
NATOMA, KS 67651

At SOUTHWIND BANK, we do not send unsolicited e-mails. You received this e-mail because you have chosen a statement option that requires e-mail notification. Thank you for banking with SOUTHWIND BANK.

Account Alerts



Accounts → Account Alerts or 

The Account Alerts screen is used to create alerts notifying you of specific account information.

Alerts

Create New Alert

Search

Sort by: Select Sort Order

Name	Account	Type	Via	Status	
Hobbs	Jason's Checking	Account Balance Greater Than \$500.00	Email	Active	Options
Pay Loan	Jeep Cherokee Loan	2 days prior to loan payment due date		Inactive	Options

Alert Options

Create New Alert

Text Alert Settings

Phone

Requires Mobile Registration

Receive Text

Requires Mobile Registration

Creating a New Alert:

1. Click **Create New Alert**.

Account Alert

Type
Account Balance

Alert Name

Checking Jason's Checking \$2,430.72

When Account Balance
Less Than

Amount
200.00

☐ Send Email

Email Address

☐ Send Text

Send Text Alert to Phone: *****3588

Inactive

Alert emails are NOT encrypted and may be viewed by third parties.
Do not include any private information in your 'Alert Name'

Cancel Submit

2. Select the type of alert. *Options are:*
 - Account Balance
 - CD Maturity Date
 - Loan Payment Due Date
 - Pending Transactions
3. Enter a name for the alert.
4. Select the account the alert is associated with.
5. Based on the type of alert, different fields display. Complete the displayed fields.
 - **Account Balance Alert** – Indicate if the alert should be prompted when the balance is greater than or less than the indicated dollar value.
 - **CD Maturity Date** – Indicate the number of days prior to the maturity date the alert should be sent.
 - **Loan Payment Due Date** – Indicate the number of days prior to the loan payment date the alert should be sent.
 - **Pending Transactions** – No extra fields display.
6. Indicate if you would like to have the alert sent via SMS/Text and/or Email.
NOTE: The phone number must be setup in the Text Banking section first.

7. Indicate if the alert is Active or Inactive. By default, the alert is set to Active once the alert is created. To deactivate the alert, click **Active** and the status will then change.
8. Click **Submit**.

Editing an Alert:

1. Click *Options*.
2. Click *Edit Alert*.
3. Make changes as needed.
4. Click **Submit** to save changes. Click **Cancel** to return to the Alerts screen.

Deleting an Alert:

1. Click *Options*.
2. Click *Delete Alert*.
3. Click **OK** to delete the alert. Click **Cancel** to return to the Alerts screen.

Editing Text Alert Times:

1. Click *Edit Text Alert Times*.

Text Alert Times

When you set up alerts, you can elect to also receive the alerts as a text message on your phone.

You can use the following to select the hours between which you wish to receive the alerts.

Send text alerts between the hours of(times in CST (GMT -6:00))

Start Time

12:00 AM

and

End Time

12:00 AM

Cancel **Submit**

2. Select the Start and End time for text alerts.
3. Click **Submit**.

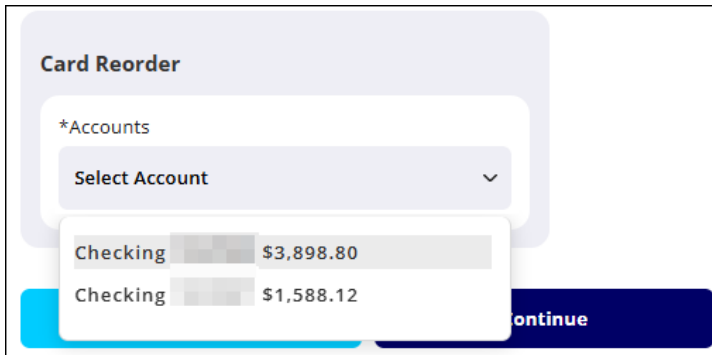
Reordering Cards

Accounts → Reorder Card

If enabled by your financial institution, you can replace and/or re-issue your debit card through Online Banking if it was lost, stolen, damaged, or being used without permission. Depending on your financial institution's settings, you may have the ability to ship the new card to you or pick it up from a financial institution location.

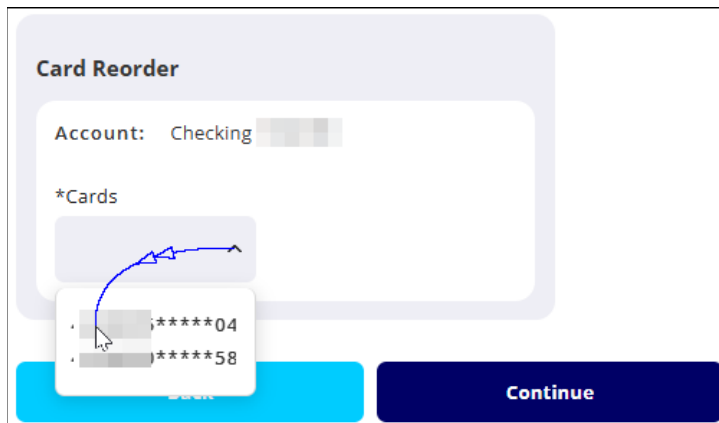
Reordering a Debit Card:

1. Navigate to the Card Reorder screen. **Accounts → Reorder**
2. If multiple accounts have cards eligible for reorder, you will be prompted to select the deposit account tied to the applicable card.



The screenshot shows the 'Card Reorder' interface. At the top, it says 'Card Reorder'. Below that is a section labeled '*Accounts'. Inside this section is a dropdown menu labeled 'Select Account' with a downward arrow. A list of accounts is displayed below the dropdown: 'Checking' with a balance of '\$3,898.80' and another 'Checking' account with a balance of '\$1,588.12'. At the bottom right of the interface is a blue button labeled 'Continue'.

3. Click **Continue** once an account is selected.
4. If multiple card accounts tied to the selected deposit account are eligible for reorder, you will be prompted to select one from the Cards field. Otherwise, the only applicable card account will display automatically.



The screenshot shows the 'Card Reorder' interface after an account has been selected. It displays 'Account: Checking' followed by a masked account number. Below this is a section labeled '*Cards'. A list of cards is shown, with the first card having a masked number ending in '****04' and the second card having a masked number ending in '****58'. A blue arrow points from the 'Continue' button at the bottom right to the first card in the list. The 'Continue' button is blue and labeled 'Continue'.

5. Click **Continue**.

The screenshot shows the 'Card Reorder' form. The 'Account' field is set to 'Checking'. The 'Card' field shows a masked number ending in 0481. The dropdown menu for '*What happened to your card?' is open, showing four options: 'It Was Lost', 'It Was Stolen', 'It Is Damaged', and 'Card Is Being Used Without Permission'. The 'Review' button is visible at the bottom right.

6. Select an option from the What happened to your card? field. *Options are:*
- It Was Lost
 - It Was Stolen
 - It Is Damaged
 - Card Is Being Used Without Permission
7. Two different messages may display, depending on the reason selected. If you indicated the card was lost, stolen, or being used without permission, the message will indicate that your current card will be closed, and a new one will be issued. If you indicated the card was damaged, the message will indicate that you can use your current card until you receive the new card. Click **Review**.

The screenshot shows the 'Card Reorder' form with 'It was lost' selected. A message states: 'Your current card will be closed and a new one will be issued.' The 'Card delivery options' dropdown is set to 'Have the card shipped to me'. The 'Review' button is visible at the bottom right.

The screenshot shows the 'Card Reorder' form with 'It is damaged' selected. A message states: 'You can continue to use your current card until you have the new card.' The 'Card delivery options' dropdown is set to 'Have the card shipped to me'. The 'Review' button is visible at the bottom right.

8. Select a delivery method. *Options are:*

- Have the Card Shipped to Me
- Pick The Card Up At Bank

9. Click **Review**.

Card Reorder

Account: Checking

Card: ****0481

*What happened to your card? Your current card will be closed and a new one will be issued.

It was lost

Card delivery options

Have the card shipped to me

Have The Card Shipped To Me

Pick The Card Up At Bank

Review

10. If you selected to pick up the card, select the location to pick up your card.

11. Click **Review**.

*What happened to your card? You can continue to use your current card until you have the new card.

It is damaged

Card delivery options

Pick The Card Up At Bank

Where would you like to pick up your card?

East Branch - Arlington, KS

Main Bank - LEON, KS

Manhattan Branch - Manhattan, KS

North

Review

12. A screen will display with the details of your card order. Click **Submit**.

Card Reorder

Account: Checking

Card: *****0481

Card Status: Lost - Your current card will be closed and a new one will be issued.

Delivery Option: New card will be shipped to you.

Back

Submit

Account: Checking

Card: *****8186

Card Status: Damaged - You can continue to use your current card until you have the new card.

Delivery Option: New card will be picked up from North Branch - Russell, KS.

Back

Submit

13. You will be prompted to complete MultiFactor Authentication.

Select Contact

This action requires additional authentication

Search

Sort by: Select Sort Order

Name	Verification Date	Contact	
jenn work email	5/23/2023 2:46:17 PM	jdonner@datacenterinc.com	Select
bleopold	11/10/2023 7:30:50 PM	bleopold@datacenterinc.com	Select

Verify Code

For your protection, additional authentication is required for this action. If you did not receive the code click ' [Resend](#) '. Please note that it may take several minutes to receive the confirmation text. Please enter the code

*Code

948403

Cancel

Submit

14. A Card Order Confirmation screen will display. The instructions at the top of the screen will vary based on the method of delivery that was selected. Click **Done**.

Your request has been submitted.

This option of card reorder will have your card shipped to the address provided.

Card Order Confirmation

Account: Checking [redacted]

Old Card: [redacted] *****0481

New Card: [redacted] *****4995

Confirm: Card ending in 0481 will be closed, and a new card ending in 4995 will be issued.

[Done](#)

This option of the card reorder will have your card shipped to the address provided.

Card Order Confirmation

Account: Checking [redacted]

Card: [redacted] *****8186

Pick Up Location: North Branch - Russell, KS

Confirm: Card ending in 8186 will be reissued.

[Done](#)

You will receive an email notification indicating a card was reordered.

Card Replacement Alert 😊 ⏪ ⏩ ↺

○ 1.0 Jenn's QA Bank <Support@telepc.net>

To: ● Jennifer Donner

Today at 3:17 PM

CAUTION: This email originated from outside of the organization. Do not follow guidance, click links, or open attachments unless you recognize the sender, are expecting mail from the sender, and know the content is safe.

Your 1.0 Jenn's QA Bank debit card replacement request has been sent. If you did not make this request, please contact 1.0 Jenn's QA Bank immediately.

Do not reply to this email as it will be returned to an unattended mailbox.

Thank you

Card Alerts

Accounts → Card Alerts

The Card Alerts screen is used to create alerts notifying you of specific card account information. Before any alerts can be created, a contact method must be established.

Card Alerts

[Create New Alert](#)

Alert Name	Account	Alert Type	Delivery
Tim's Test Card Alert	[Redacted]	ATM Withdrawal	1-Email

Alert Options
[Create New Alert](#)
[Setup Alert Contacts](#)
[Edit Delivery Times](#)

[Alert Delivery Times](#)

Creating a New Card Alert Contact Method:

1. Click *Create New Contact*.
2. Enter the type of contact and the phone number or email address.
3. Click **Save Changes**.
4. If a mobile phone number was selected, the customer must accept the Opt-In agreement.
5. Navigate to **Accounts → Card Alerts → Setup Alert Contacts** to navigate directly to the alert contact screen.
6. Click to resend the opt-in agreement, if needed.
7. Repeat the steps as needed to add additional contact methods.

Card Alert Contacts

Email Address

[Redacted]	
[Redacted]	
[Redacted]	

Text Phone Number

Text Phone Number	Status	Opt-In Date
[Redacted]	Opt-in request sent	

Alert Contact Options
[Create New Contact](#)
[Card Alerts](#)

Click to remove the contact method.

Creating a New Card Alert:

1. Navigate to the Card Alerts screen. **Accounts → Card Alerts**
2. Click **Create New Alert**.

Card Alert

Account: 436157*****
Type: ATM Withdrawal
Name: ATM Withdrawal

☒ Send Email
☐ Email Address
☐
☒ Send Text
☐ Phone #
☒

☒ Active ☐ Inactive

Cancel **Save Changes**

3. Select the Card Account the alert is associated with.
4. Select the type of alert.
5. Enter a name for the alert.
6. Click the box next to the contact methods where you would like to have the alert sent.
7. Indicate if the alert is Active or Inactive. By default, the alert is set to Active once the alert is created.
8. Click **Save Changes**.

Editing a Card Alert:

1. Click .
2. Make changes as needed.
3. Click **Save Changes**. Click **Cancel** to return to the Card Alerts screen.

Card Alerts

Create New Alert

Alert Name	Account	Alert Type	Delivery
Tim'sTestCardAlert	436157*****0100	ATM Withdrawal	1-Email  

Click  to delete the alert.

Editing Card Alert Delivery Times:

1. Click *Edit Delivery Times*.

Alert Delivery Times

☒ Send email alerts any time of day
 ☐ Send email alerts between the hours

of

12:00

AM

and

12:00

AM

☒ Send text message alerts any time of day
 ☐ Send text message alerts between the hours

of

12:00

AM

and

12:00

AM

Time zone

Central

Observe Daylight Savings Time

Yes

Alert Options

Save Changes

Cancel

2. Select the radio button *Send email alerts between the hours* to designate a delivery timeframe for email alerts. Set the start and end times as needed.
3. Select the radio button *Send text message alerts between the hours* to designate a delivery timeframe for text alerts. Set the start and end times as needed.
4. Set the Time Zone.
5. Indicate if your location observes daylight savings time.
6. Click *Save Changes*.

Travel Indicators

Accounts → Travel Indicators

Use the Travel Indicators option to submit notification when and where you will be traveling.

Creating a Travel Indicator:

1. Navigate to the Travel Indicators screen. **Accounts → Travel Indicators**
2. Click **Create New Travel Indicator**.

Card Travel Indicators

Create New Travel Indicator

Search

Sort by: Select Sort Order

Card Last 4	Travel Info
Jason's Card	No Expected Travel

Travel Indicator Options
Create New Travel Indicator

3. The start date will default to today's date. Use the calendar icon or enter the date manually in the Start Date field.
4. Indicate the last date of travel in the End date field.
5. Select the card accounts impacted.
6. Indicate the country you will travel to.

New Card Travel Indicator

Start Date: 8/5/2024

End Date: 8/9/2024

Card Accounts

☒ 5646

Country: United States

Region/State: Alabama

Add Location

Remove Location

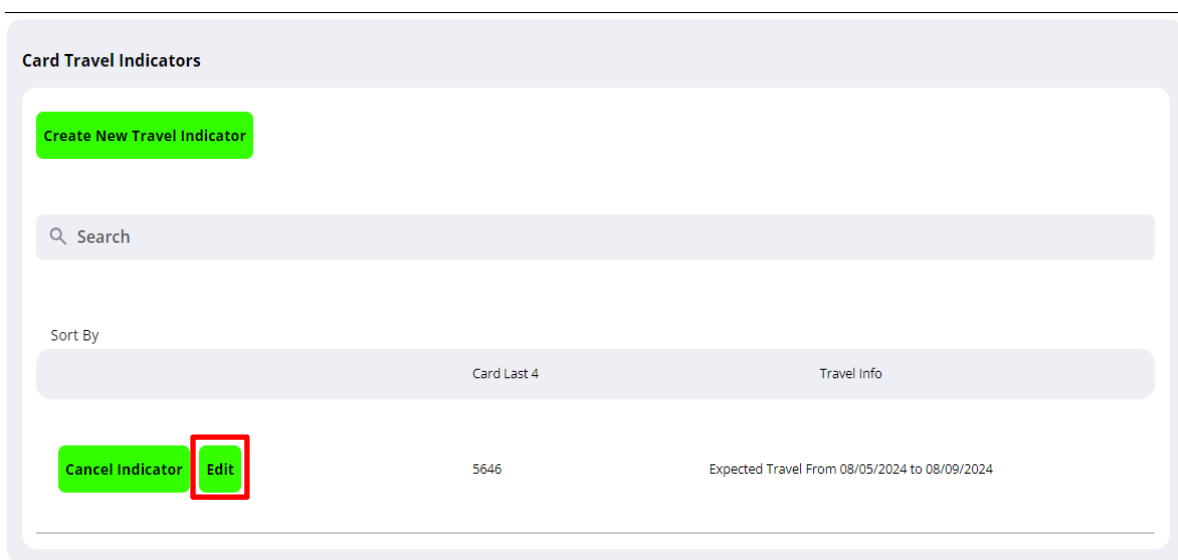
Cancel Submit

7. The Region/State field will not display until you select a country. If United States was selected from the Country field, select the state you will be traveling to.
8. To add an additional location, click **Add location** and follow the same steps above.
9. Click **Submit**.

You will be navigated back to the Travel Indicators screen. A message will display indicating the travel indicator was successfully created.

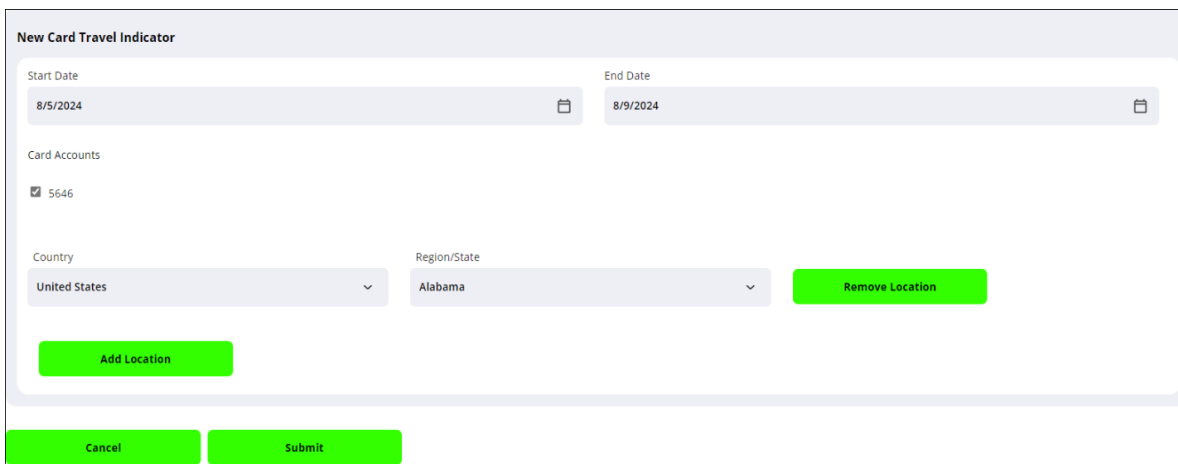
Editing a Travel Indicator:

1. From the Card Travel Indicators screen, click **Edit**.



The screenshot shows the 'Card Travel Indicators' interface. At the top is a green button labeled 'Create New Travel Indicator'. Below it is a search bar with a magnifying glass icon and the text 'Search'. Underneath is a 'Sort By' section with two options: 'Card Last 4' and 'Travel Info'. A table displays one travel indicator entry. The first column contains a green 'Cancel Indicator' button and a green 'Edit' button (which is highlighted with a red rectangular box). The second column shows the card number '5646'. The third column shows the travel dates 'Expected Travel From 08/05/2024 to 08/09/2024'.

2. Make changes, as needed.
3. Click **Submit**.



The screenshot shows the 'New Card Travel Indicator' form. It includes fields for 'Start Date' (8/5/2024) and 'End Date' (8/9/2024), each with a calendar icon. Below these is a 'Card Accounts' section with a checked checkbox next to the card number '5646'. The 'Country' dropdown menu is set to 'United States', and the 'Region/State' dropdown menu is set to 'Alabama'. There is a green 'Remove Location' button next to the region dropdown. At the bottom left is a green 'Add Location' button. At the very bottom are two green buttons: 'Cancel' and 'Submit'.

Transfers

External Transfer Accounts

Transfers → External Transfer Setup

The External Transfer Accounts screen is used to create, edit and view linked accounts.

External Transfer Accounts

Checking

Sort by: Select Sort Order

Account	Name	Financial Institution	Status
8769898638	ABC Checking	ABC Bank	Approved Awaiting Confirmation
8174602543	Amanda Chk 1	Citibank Online	New Awaiting Approval Plaid
8769898638	FNB Checking	First National Bank	Confirmed Active

Savings

Sort by: Select Sort Order

No records to display.

Transfer Options

Create External Transfer Account

TIP: Click to edit the external account Name, financial institution information and update the status of the account.

Click to delete the linked account.

Status

Status of the linked account. *Options are:*

- **New Awaiting Approval** – The linked account was created and awaiting approval by the financial institution. Plaid will be noted if applicable.
- **Approved Awaiting Confirmation** – The linked account was approved by the financial institution and the deposit amounts need to be confirmed by the user.
- **Confirmed Active** – The user has confirmed the external account and can now set up a transfer.

- **Failed** – The ACH micro deposit amounts were not confirmed correctly by the user.
- **Denied** – The linked account was denied by the financial institution.

There are two methods of setting up an external account; ACH micro deposits and/or Plaid, depending on the options offered by your financial institution.

- **ACH micro deposits** – Micro deposits are made to the external account and could take up to 2 business days to be processed. Confirmation of those amounts are required to verify the account.
- **Plaid** – Enter the online banking credentials (login name and password) to the external financial institution and select the correct account. Verification must be completed immediately.

If both options are available, use the following screen to select the preferred option.

External Funds Transfer

You may securely link your external account by using Plaid. Enter your online banking credentials (login name and password) to the external account to link and begin transferring funds.

Link Account with Plaid

You may securely link your external account by using ACH micro deposits. Enter your Financial Institution information, including routing number and account number, to begin the linking process. To complete the process you will need to verify two micro deposits made to the external account. This process can take two business days.

Link Account with ACH

Cancel

Creating a New External Transfer Account using ACH Micro Deposits:

1. Click *Create External Transfer Account*.
2. Click the *Link Account with ACH* button if two options display.
3. Enter the Name.
4. Enter the financial institution.
5. Enter the routing number.
6. Reenter the routing number.
7. Enter the account number.
8. Reenter the account number.
9. Indicate the Account Type.
10. Click **Submit**.

External Funds Transfer

Name:

Financial Institution:

Routing Number:

Reenter Routing Number:

Account Number:

Reenter Account Number:

Account Type:

Checking

Cancel

Submit

Susan B. Sample

2244 Lois Lane

Anytown, FL 32123-4567

5678

Pay to the Order Of

\$

Outlets

Memo:

1234567890123456789012345678

YOUR 9-DIGIT BANK ACH ROUTING NUMBER

YOUR BANK ACCOUNT NUMBER

CHECK NUMBER (only appear before account number)

NOTE: If you incorrectly enter the micro deposits, and the status is set to failed, you will need to click  to delete the attempted link and start the process over.

Once the financial institution has approved the linked account, a  displays.

External Transfer Accounts

Checking

Sort by:

Select Sort Order

Account	Name	Financial Institution	Status	
1111222233330000	Alberta Bobbeth Charleson	Bank of America	Confirmed Plaid	
123123	Susan's Fun-Fund	Chase	Approved Awaiting Confirmation	

11. Select the  to enter the confirmation amounts.

12. Enter the amounts.

NOTES:

- Amounts should be entered as cents. For example, if the micro deposits were for \$0.36 and \$0.48, enter 36 and 48 in the confirmation amount fields.
13. When the external account is a loan account, there will not be a micro deposit transaction or confirmation amounts to be entered.
14. Click **Submit**. Once the confirmation amounts are entered correctly, an external transfer can be performed.

External Funds Transfer Confirmation

Account:

123123

Name:

Susan's Fun-Fund

Financial Institution:

Chase

Confirmation Amount

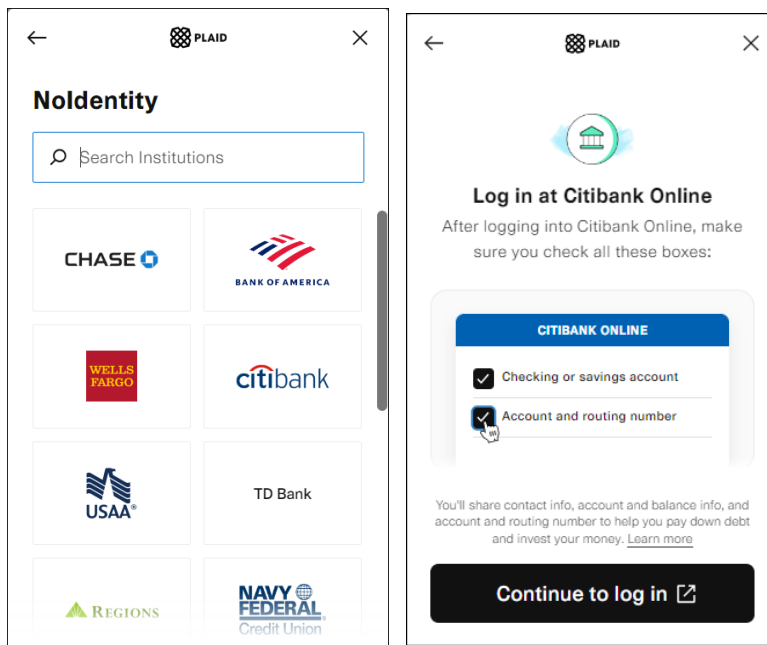
Confirmation Amount

Cancel

Submit

Creating a New External Transfer Account using Plaid:

1. Click *Create External Transfer Account*.
2. Click the *Link Account with Plaid* button if two options display.
3. Click **Continue**.
4. Select the correct bank icon. A search may be required to locate the correct icon.
NOTE: *If the external institution cannot be located, cancel, and proceed with the ACH micro deposit option if available.*
5. Enter the User ID and password that you use to login to that financial institution.
6. Click **Submit**.
7. Select the appropriate account(s).
8. Click **Continue**.
9. Click **Continue** on the Success confirmation page.



Transfer Funds

Transfers → New Transfer

The New Transfer screen is used to transfer money to and from internal and external deposit and loan accounts.

NOTE: *External deposit and loan accounts must be created, approved, and confirmed on the External Transfer Setup screen in order for them to display within the Transfer Funds screen.*

Creating a New Transfer:

1. Select the From account.
2. Select the To account.
3. Enter the Amount.
4. Select the frequency. *Options are:*
 - One Time
 - Future, One Time
 - Future, Scheduled
5. If a future option was selected, enter the date the transfer should process.
6. If the transfer falls on a holiday, indicate if the transfer should process the business day before or after the scheduled date.
7. If transferring to a loan, select the type of loan payment.
8. Enter a Memo, if applicable.
9. Click **Continue**.
10. Click **Confirm** to complete the transfer.
11. Click **OK**.

NOTES:

- *When creating a transfer, one of the accounts must be an internal account.*
- *Transfers involving external accounts may take 1-2 business days to be effective.*

Good Morning

Transfer Funds

*From:

Checking Jason's Checking Balance = \$2,430.72

Available Balance = \$2,420.76

*To:

Checking 8992 Balance = \$9,391.41

Available Balance = \$9,381.41

*Amount:

500.00

*Frequency:

Future, Scheduled

*Process according to the defined schedule.

*Process Every

1

Frequency

week(s)

☐ Process on last day of the month.

Beginning on

7/12/2024

Ending on

If the transfer falls on a holiday, process

Scheduled date:

Before

Memo:

Cancel

Continue

If attempting to create a transfer for more than the amount available in the account, the following message will display.

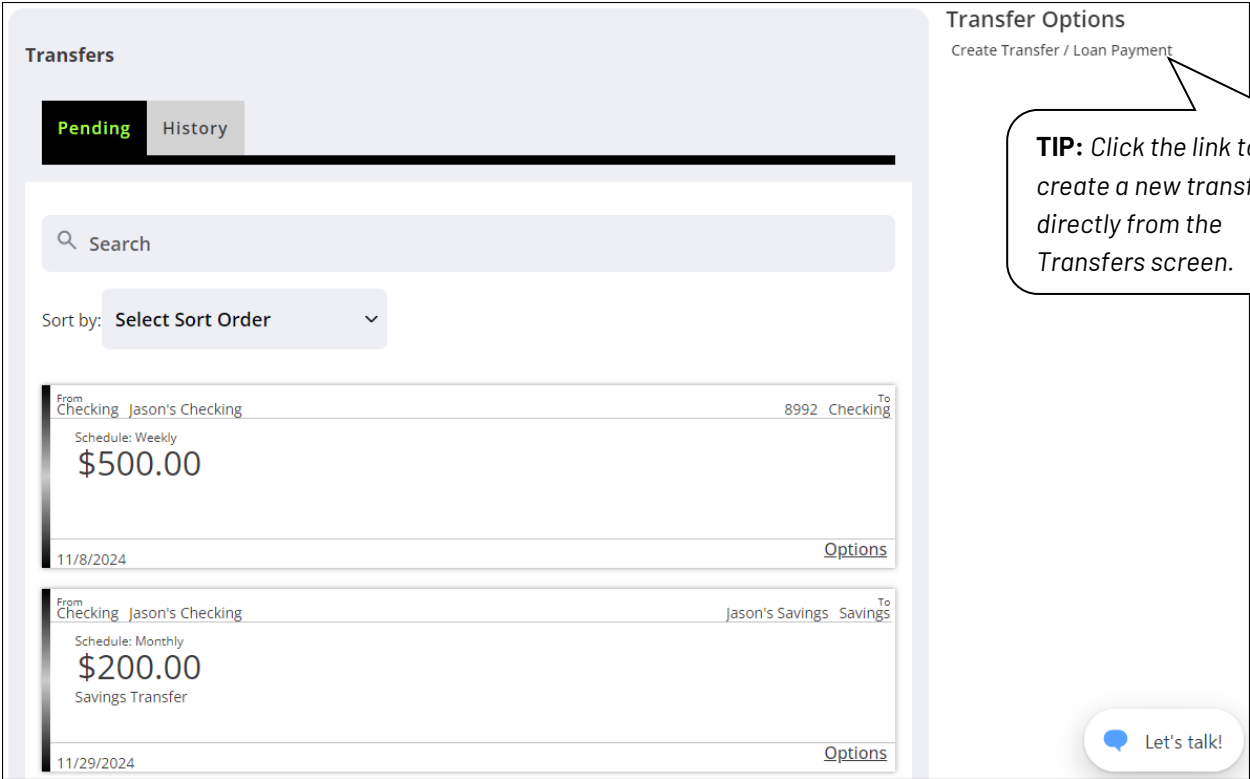
Transfer Funds


Insufficient Funds in FROM account.

Transfers

Transfer → View Transfers

The Transfers screen is used to view pending transfers and transfer history. Sort options are available by clicking in the *Sort By* section. Use the *Search* section to search for transfers using key words or amounts including the memo information.



From Account

Account the transfer is originating from.

To Account

Account the transfer is going to.

Schedule

Indicates the frequency of the transfer.

Approve

Click to approve the transaction. If this button displays, the transaction must be approved prior to the transaction being submitted to the financial institution.

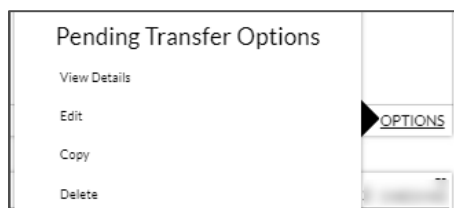
NOTE: If the *Approve* button is grayed out, this indicates the user has self-approval rights and has already approved the transaction.

Approved Indicates the transfer has been approved.

Date Date the transfer is scheduled to occur.

Pending Transfer Options

Pending Transfer Options are available by clicking *Options* while on the Pending tab.



View Details – Displays the details for the selected transfer.

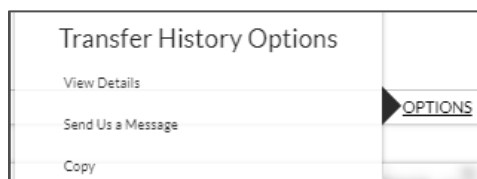
Edit – Directs you to the Edit Funds Transfer screen. If the transfer is recurring, the option to edit the next occurrence or series displays.

Copy – Directs you to the Transfer Funds screen, giving you the ability to copy a previously created transfer.

Delete – Directs you to the Delete Funds Transfer screen, giving you the ability to delete the next occurrence or delete the series.

Transfer History Options

Transfer History Options are available by clicking *Options* while on the History tab.



View Details – Displays the details for the selected transfer.

Send Us a Message – Directs you to the Compose Message screen giving you the ability to send a message to the Financial Institution.

Copy – Directs you to the Transfer Funds screen giving you the ability to copy a previously created transfer.

Bill Payments

Bill Pay

Bill Payment → Go to Bill Pay or  Bill Pay

Bill Payment is used to access the Bill Pay application.

Bill Pay Personal Info

Bill Payments → Personal Information

The Bill Pay Personal Info screen is used to modify the account owner's name and address. This information will be used when paying a bill.

Alternate Phone Number

☐ SMS/Text Capable

Remove

Add Alternate Phone

CancelClearSubmit and Go To Bill PaySubmit

Billpay Personal Info

*Email

bhobbs@datacenterinc.com

*Phone

620-960-4593

☐ SMS/Text Capable

Alternate Phone Number

☐ SMS/Text Capable

Remove

Bill Pay Accounts

Bill Payments → Account Information

The Update Bill Pay Accounts screen is used to select accounts that should be available in Bill Pay.

Update Billpay Accounts

☒ Enable Billpay

Customer #: 100001
Account Type: Checking
Account #: 1
Account Name: Charles Checking
[Edit Account Info](#)

Submit

Submit and Go To Bill Pay

Text Banking

Text Banking Setup

Text Banking → Sign Up

The Text Banking Setup screen is used to register for Text Banking. This option will only display if you are not currently signed up for text banking.

1. Select the "I Accept" check box.

2. Click **Submit**.

Text Banking Setup

Text Banking allows you on-demand access to your accounts directly from your cell phone. Please review and accept the terms and conditions below to get started.

Supported Carriers:

- AT&T Mobility
- Verizon
- T-Mobile
- Sprint
- Dobson
- Boost
- Alltel
- Virgin Mobile
- US Cellular
- Cricket

To get started now, please take a moment to review these important agreements and click Submit below:

- You may be charged access rates or text messaging fees from your mobile phone carrier depending on your service plan. These fees are independent of any fees imposed by the bank. Web access is required to use our web-enabled Mobile Banking service. Check with your mobile service provider for details on specific fees and charges.
- Must be account holder or have permission from the account holder to subscribe.
- All subscriptions renew automatically until canceled.

☐ I Accept

Message frequency is dependent upon individual user settings.

CancelSubmit

Setting up Text Banking:

1. Enter the mobile phone number that should be registered for Text Banking.
2. Select the *Enable weekly balance message for text messaging enabled accounts* checkbox to automatically receive balance(s) for enabled accounts via text message, if applicable. (If not selected, skip to step 4.)
3. Select the day of the week and time of day for the messages to be delivered.

NOTE: The reflected time will always be Central Standard Time.

4. Click the Text Messaging checkbox to enable text banking for the applicable account.
5. In the Mobile Friendly Name column, edit the mobile friendly name as needed.

Text Banking Setup

- Enter your Mobile Phone Number
- Determine whether or not you wish to receive a text message containing balances for all text messaging enabled accounts.
- Determine which day of the week and time of day you wish to receive the weekly text message.
- At any time, you may Text STOP to 44660 to cancel, or text HELP to 44660 for HELP

☐ Enable weekly balance message for text messaging enabled accounts *

Mobile Phone #

Send weekly balance message on Monday at 9:00 AM CST (GMT -6:00)

* Msg&Data Rates May Apply | Msg frequency varies by user

- Check the boxes next to the accounts you want to enable.
- You may use the names assigned, or you may enter your own friendly name for each account. Your friendly name may be up to 5 digits and/or characters.

Checking

Account	Customer	Text Messaging	Mobile Friendly Name
Jason's Checking	100008	☐	ck1
Jessica's Checking	100008	☐	ck2

Loan

Account	Customer	Text Messaging	Mobile Friendly Name
Jeep Cherokee Loan	100008	☐	ln1
Business Loan	100008	☐	ln2
Home Loan - Escrow	100008	☐	ln3

Submit

Text Banking Options

Instructions

[Unsubscribe](#)

6. Click **Submit**.
7. An activation text is sent to the mobile phone provided. Reply to the text with the displayed activation code. If the text message should be resent, click **Resend**.

Your activation is pending confirmation by you via text message. Please reply to your confirmation text message with the following activation code **OK 174223**

Resend

NOTE: Once text banking has been set up, edits to your settings can be made by navigating to the Text Banking Setup screen. **Text Banking → Edit My Settings**

Instructions

Text Banking → Instructions

The Instructions screen provides the following information:

- How to use the Mobile Text Message Service
- Terminology for text messaging requests
- List of supported carriers
- Messaging examples
- Opting out
- Terms and Conditions

When first signing up, a **Resend** button will be available to resend the opt-in code. After clicking **Resend**, a message will display indicating the code was re-sent.

Confirmation message re-sent to: 6209211111

Mobile Banking Instructions

Your activation is pending confirmation by you via text message. Please reply to your confirmation text message with the following activation code: **OK 315909**

If you have not yet received your confirmation message, click the button below to resend

Resend

To Use Mobile Text Message Service: *

- Send text with the one of the requests listed below to: 44660
- Message frequency is dependent upon individual user settings.

Text Messaging Requests:

- sum - Receive summary information for all enabled accounts
- bal - Receive balances for enabled accounts
- msg - Text message directly to designated bank contact
- sum ck1 - Receive summary information for account ck1
- bal sv2 - Receive balance information for account sv2
- help - text: HELP to 44660 for help

Remember, you may use your own mobile friendly names, up to 5 characters, to replace the example account names (E: ck1, sv2).

Text Banking Options
Settings
Unsubscribe

Unsubscribe

Text Banking → Unsubscribe

The Text Banking Unsubscribe screen is used to unsubscribe from text banking services.

Text Banking Unsubscribe

Unsubscribing from Text Banking will disable all features for this customer and any associated secondary users.

- No account information will be accessible via SMS text messaging
- No account alerts will be sent to your mobile device

If you wish to use this service in the future, you will need to go through the entire registration process again.
Do you wish to UNSUBSCRIBE from mobile banking at this time?

Cancel **Unsubscribe**

Preferences

Customer Preferences

Preferences → Security Options → Customer Preferences

The Customer Preferences screen displays basic contact information along with the additional applications you have access to.

Customer Preferences

Customer	100008
Login Name	bhobbs
Email Address	b****@datacenterinc.com
Email alert for new message	Enabled
Mobile Phone #	*****3588
Weekly Balance Alert	Fridays at 9:00 AM CST(GMT-6:00)
Send Alerts Between	Not Configured.
Cash Management	Enabled

Contact/Authorization Method

Preferences → Security Options → Change Security Contact

The Contact/Authorization Method screen displays contact methods that have been created.

Contact / Authorization Method

Contact Method
New Contact Method

These are the contact methods you have previously entered. When signing into Online Banking, you may be asked to select a contact method to have your security code sent to.

Contact List

Sort by: Select Sort Order

Name	Verification Date	Contact	
bhobbs dci demo bank	8/16/2021 4:28:34 PM	Google Authenticator	✕
Brandi's Cell	9/12/2016 4:15:42 PM	*****3588	✕
Brandi's Email	5/16/2016 10:46:25 AM	b****@datacenterinc.com	✕

Creating a New Contact Method:

1. Click **New** or *New Contact Method* to create a new contact method.
2. Indicate the method for contact in the Contact Type field.
3. Enter a name in the Name field. This is only used to reference the contact method.

Add Contact

*Contact Method:

Text Message

After entering in your contact information, a confirmation code will be sent to the phone number provided. You must enter this code on the 'Contact Method' page prior to use.

Name

Bobby Banker Cell

*Phone Number

555-555-5555

Cancel Submit

4. Enter the Phone Number, Email or Google Authenticator information.
5. Click **Submit**.
6. Select an established contact to authorize this new contact method.

Select Contact

This action requires additional authentication

Search

Sort by: Select Sort Order

Name	Verification Date	Contact	
brooke email	3/25/2022 9:49:35 AM	bswanner@datacenterinc.com	Select
Joy	2/3/2021 10:12:20 AM	jwhitman@datacenterinc.com	Select
Sam	2/13/2017 2:24:40 PM	sfroese@datacenterinc.com	Select

7. Enter the verification code received via email or text message, or enter the code generated in Google Authenticator. If needed, click **Resend** to receive a new code.

Verify Contact

Please enter the confirmation code that was sent to the phone number you provided. (*****5396) If you did not receive the code click [Resend](#).

*Code

543627

[Cancel](#) [Submit](#)

- Enter the verification code received by the new contact method via email or text message, or enter the code generated in Google Authenticator. If needed, click **Resend** to receive a new code.

Verify Contact

Please enter the confirmation code that was sent to the phone number you provided. (*****5555) If you did not receive the code click [Resend](#).

*Code

|

[Cancel](#) [Submit](#)

- Click **Submit**.

NOTE: If **Cancel** was selected, the contact method can still be verified on the Contact/Authorization Method screen. Select  [Validate](#) to be returned to the Verify Contact screen.

Contact List

Search

Sort by: [Select Sort Order](#)

Name	Verification Date	Contact	
brooke email	3/25/2022 9:49:35 AM	bswanner@datacenterinc.com	
Brooke Gmail		brooke.swanner@gmail.com	Validate 

Click  to delete the contact method.

Edit Login Name

Preferences → Security Options → Change Login Name

The Edit Login Name screen is used to edit your login name.

Edit Login Name

For security reasons, your Login Name may not be the same as your Customer number.
The Login Name you create may be up to 15 characters in length.
The next time you sign in to Online Banking, you must use this Login Name.

*Login Name

susanbanker

Cancel

Submit

Edit Password

Preferences → Security Options → Change Password

Editing your Password:

1. Enter the current password used to login to Online Banking.
2. Enter the new password in the New Password field.
3. Re-enter the password in the Confirm Password field.

Edit Password

Your new password is case sensitive and may be any combination of letters, numbers, and keyboard characters. Your password must also meet the following requirements:
Passwords must contain a minimum of 6 to a maximum of 44 characters

*Current Password



*New Password



*Confirm New Password



CancelSubmit

4. Click **Submit**.

Edit Customer Account Info

Preferences → User Options → Edit Customer Account Info

The Edit Customer Account Info screen is used to display the customer record and all online banking accounts. Any fields that were enabled will be available to edit if you have access. Changes made will be sent to Southwind Bank. For phone number changes please contact Southwind Bank.

NOTE: This menu option may display as View Customer Account Info dependent on your access. No changes can be made in this view.

The screenshot displays a web interface for editing customer account information. It features three main sections, each with a blue header bar and a light gray body area. The first section is labeled 'Address/Contact Info' and contains a 'Change' button. The second section is labeled 'Checking - [Account Number]' and contains an 'Address' button. The third section is labeled 'Loan - [Account Number]' and contains an 'Address' button. At the bottom of the form are two buttons: 'Cancel' and 'Submit'.

Editing Customer Account Information:

1. Click on the tile to edit.
2. Make changes, as needed.
3. Click **Submit**.

Address/Contact Info

*Street Address

*City

TOPEKA

State

KS

*Zip

66614-1622

☐ Update ALL Account Addresses to Customer Address

* TO UPDATE INTERNATIONAL ADDRESS(ES) CONTACT YOUR FINANCIAL INSTITUTION

Home Email

@gmail.com

Business Email

@datacenterinc.com

Home Phone

Cell Phone

Business Phone

Checking - Address

Loan - Address

Cancel

Submit

Edit Email Address

Preferences → User Options → Update Email Address

The Edit Email Info screen is used to edit the email address utilized within Online Banking. This is the email address notifications will be sent to regarding correspondence within the Online Banking system and when registering the email address to view online statements.

Edit Email Info

Changing your email address will invalidate the email address previously registered.

*Email Address

bbanker@datacenterinc.com

☒ Send an alert to this address when I receive a secure message.

Cancel **Submit**

Account Settings

Preferences → User Options → Account Settings

The Account Settings screen is used to create and edit user defined names for the displayed accounts, sort the accounts, favorite or hide accounts.

The screenshot displays the 'Account Settings' interface. It features a 'Favorites' tab at the top. Below it, there are two sections: 'Checking' and 'Savings'. Each section contains a list of accounts with the following fields: Account Number, Current balance, Available balance, Name, Order, Favorite checkbox, and Hide checkbox.

Account Number	Current	Available	Name	Order	Favorite	Hide
1237	\$2,430.72	\$2,420.76	Jason's Checking		☒	☐
1237	\$2,430.72	\$2,420.76	Jason's Checking	1	☒	☐
4001	\$3,146.90	\$3,136.90	Jessica's Checking	2	☐	☒

Name

Enter a user defined name in the Name field to be displayed throughout the system instead of the account number.

NOTE: For remote deposit capture if there is duplication of names or usage of special characters in these fields, errors will occur during the registration process.

Order

Use the order column to indicate the order the accounts should display. You can only sort accounts with the same account type. For example, you cannot sort checking and loan accounts so they display in a mixed order. You can also sort your favorite accounts.

Favorite

Click the Favorite check box to add this account to the favorites tab. By default, no accounts will be selected as favorites.

NOTE: Different account types can be grouped together on the Favorites tab.

Account Summary

Favorites

Checking

Savings

CD

Loan

Card

Jason's Savings

2417

Favorites

Available

\$3,133.37

Current

\$3,143.37

Transactions

>

Jessica's Checking

4001

Favorites

Available

\$3,136.90

Current

\$3,146.90

Transactions

>

* Balance as of 03/07/2025

Hide

The hide option will hide the account from view.

NOTES:

- The Hide option will not display for accounts with the Favorite check box selected.
- The Favorite option will not be available for selection when the Hide check box is selected.
- If you update the Name field of an account in the favorite view, it will also update the account in the account type section it is located in.

Opt In Agreements/Policies

Preferences → User Options → Opt In Agreements/Policies

The Opt In Agreements screen displays opt in agreements/policies for the financial institution.

Opt-In Agreements

Sort by: Select Sort Order

Notice	Updated	Status
E-Mail Address Registration	09/04/2012	Opted In on 08/02/2024
E-Statement Enrollment	07/01/2022	Opted In on 04/15/2020

Policies

Sort by: Select Sort Order

Notice	Updated	Status
Privacy Policy	08/24/2021	Accepted on 09/07/2018

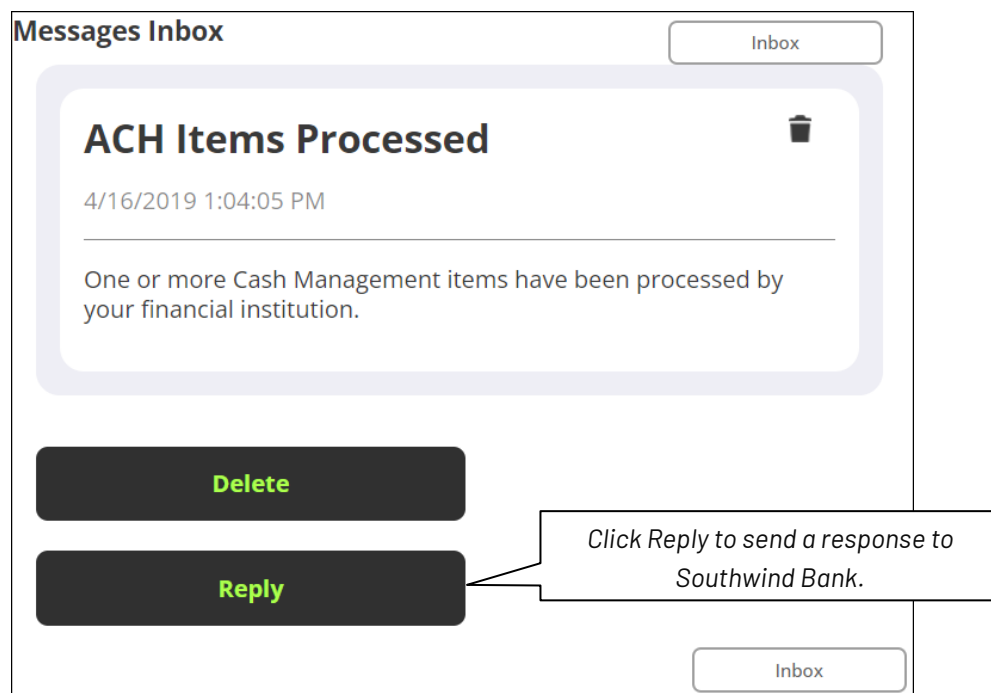
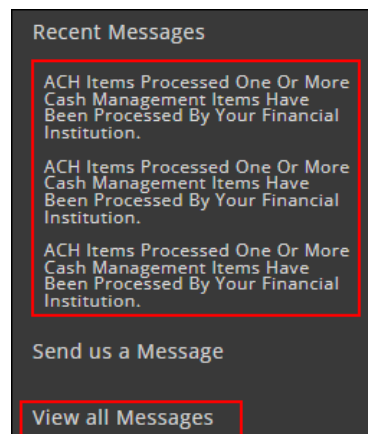
Correspondence

Recent Messages

Correspondence → Recent Messages 

The Recent Messages section displays correspondence between the user and the financial institution. Click the message to be directed to the Message Inbox to view the entire message.

Select *View All Messages* to be directed to the Message Inbox screen.



Compose Message

Correspondence → Send Us a Message

The Compose Message screen is used to send a message to Southwind Bank in a secure method.

Compose Message

Category
Deposit

Accounts
None

Subject

Body

abc B I U abc

Cancel Send

Links

Links

Links → Select the link

The Links section will display links to additional URL's provided by your financial institution.

