

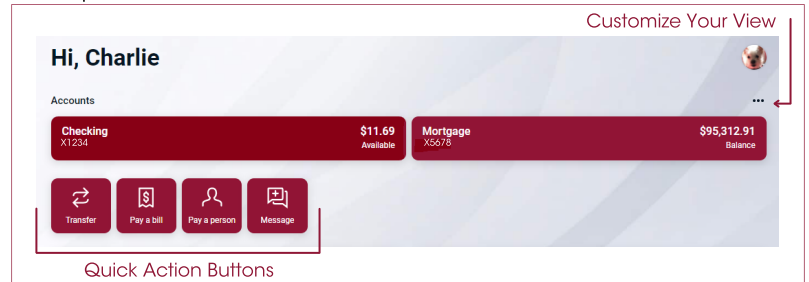
Quick Reference Guide

These tips apply to both online banking and the mobile app.

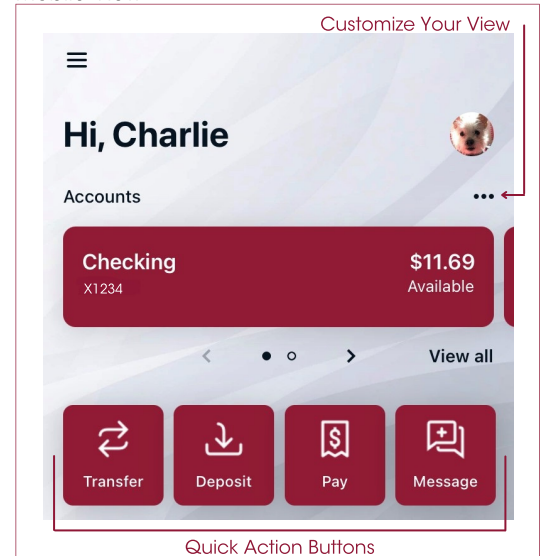
CUSTOMIZE YOUR VIEW

Tap the "..." in the upper right corner of any section to reorganize the dashboard layout and adjust the information displayed in each section. Many of these features can also be accessed from the Menu in the upper left, or from the Quick Action buttons under the Accounts listing.

Desktop View



Mobile View



ACCOUNTS

View your accounts and available balances. Flip through all your accounts by swiping the Accounts section left or right.

- Use the Quick Action buttons on the Dashboard to access features like transfers, paying a bill, paying a person, send a message, or making a mobile deposit.
- Select the account name for additional options, such as viewing transactions, making a deposit, viewing Statements and setting alert preferences.

FREQUENTLY USED FEATURES

Hint: To locate Settings on your desktop, click your name at the bottom of the menu. To locate Settings in mobile, tap the three bars for the menu.

Add or Remove Accounts from Dashboard View

Menu > Settings > Better Banks (under Accounts) > Select account > Display Options

Rename Accounts

Choose an account from the Dashboard > Settings > Rename

Alerts

Choose an account from the Dashboard > Alert Preferences

eStatements

Choose an account from the Dashboard > Statements

Change User Name, Password, Passcode, Face/Touch ID or Phone Number for Two Factor Authentication
Menu > Settings > Security

Add Your Picture or Change Your Name

Menu > Settings > Profile > Click the pencil next to the round image
Menu > Settings > Profile > Click Edit Preferred First Name

Update Your Email or Phone Number

DESKTOP
Menu > Settings > Profile
Click edit next to the information you wish to change.

MOBILE

Menu > Settings > Select Your Name >
Click edit next to the information you wish to change.

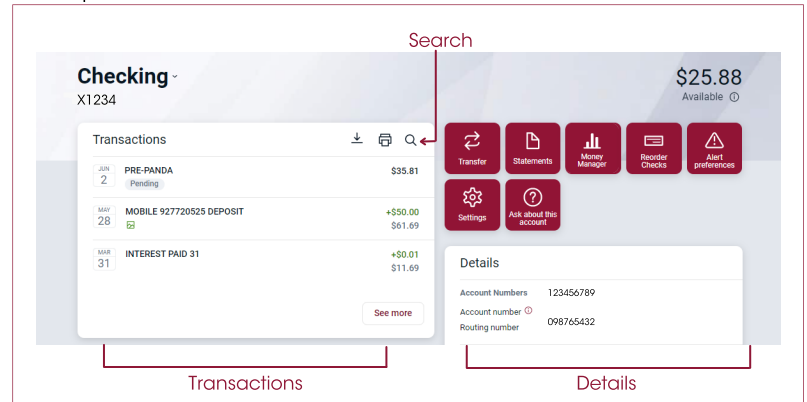
Quick Reference Guide (cont'd)

TRANSACTIONS

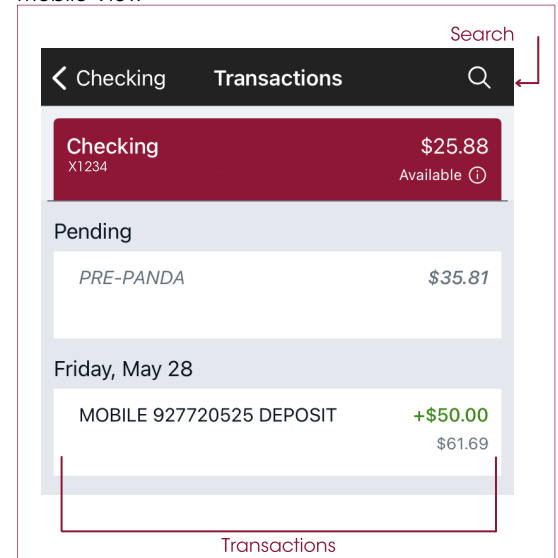
View transactions across all your accounts from the dashboard Transactions section. To view transactions from a single account, select the Account from the dashboard.

- Search for transactions by using the magnifying glass in the upper right of the Transactions section.
- Select any posted transaction to add a tag, note, or attach an image, such as a receipt.
- See additional transaction details by clicking on specific transaction.

Desktop View



Mobile View



PAYMENTS

Pay bills, pay a person, add payees, or just get an overview of your most recently made and scheduled payments.

- From your desktop, select Payments to access bill pay options, including editing or deleting payees or scheduled payments, managing payments, managing recurring payments and viewing payment history.



TRANSFERS

Move money between Better Banks accounts or send and received funds from accounts at other financial institutions.



MESSAGES

Start a conversation with a Better Banks representative during posted hours. You may also leave a message after hours and we'll respond the next business day.



DEPOSIT CHECK (MOBILE APP ONLY)

Deposit a check right from your phone or tablet using the Deposit button on the Dashboard.



BUDGETING TOOLS

Take control of your money with our Money Manager tools and get a holistic view while you build a stronger financial future.

REMEMBER TO LOG IN PERIODICALLY TO PREVENT YOUR DIGITAL BANKING ACCOUNT FROM GOING DORMANT.