

Accounts

1. A listing of accounts the user has access to is shown in the middle of the screen.
2. The 'Transfer Money Now' option on the top right corner of the screen is a direct shortcut to the 'Transfer Funds' option within the 'Transactions' menu.
3. The 'Commercial Transactions' option on the top right corner of the screen is a direct shortcut to the 'Payments' option within the 'Commercial' menu.
4. The 'View Activity Center' option on the top right corner of the screen is a direct shortcut to the 'Activity Center' option where transactions indicated above can be approved.
5. Click the 'Printer' icon above the account listing towards the right side of the screen to print a listing of accounts.
6. The 'Asset Summary' at the bottom of the screen is a pictorial representation of the distribution of the accounts' assets.
7. Click on any account to go to the 'Account Details' page to view account details and transaction history associated with the account.



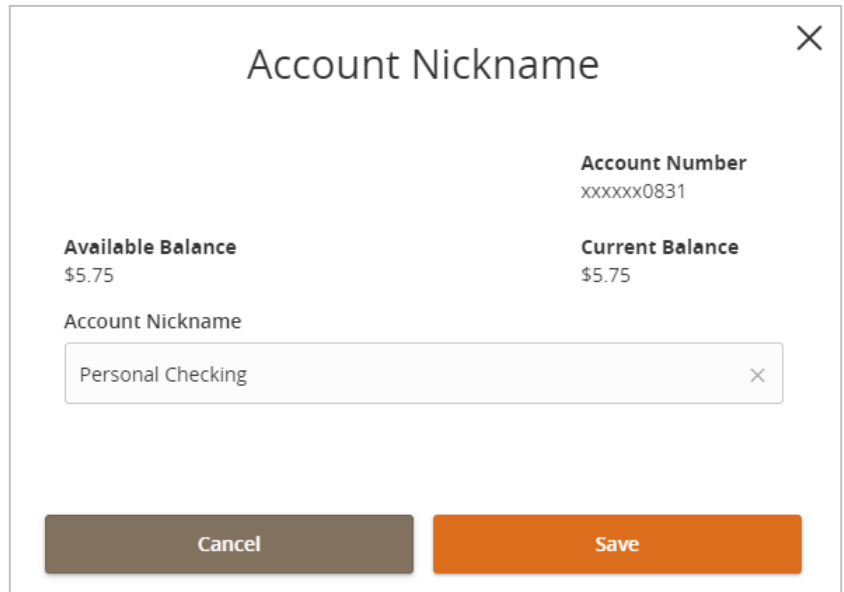
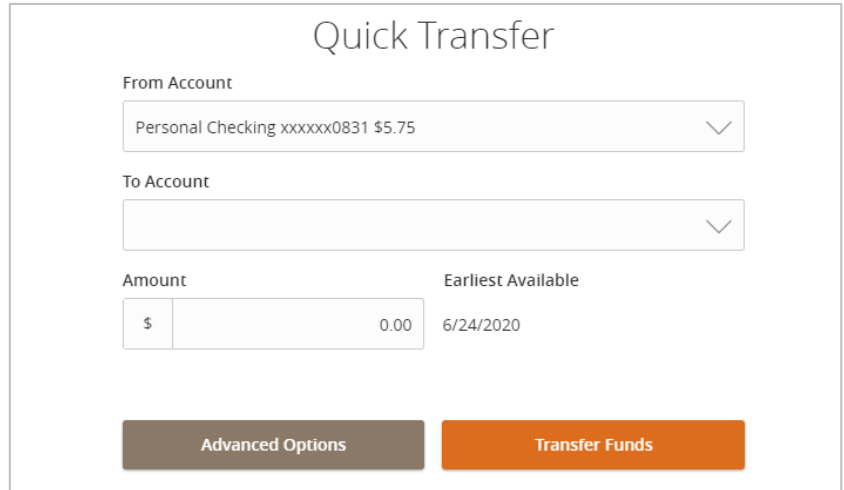
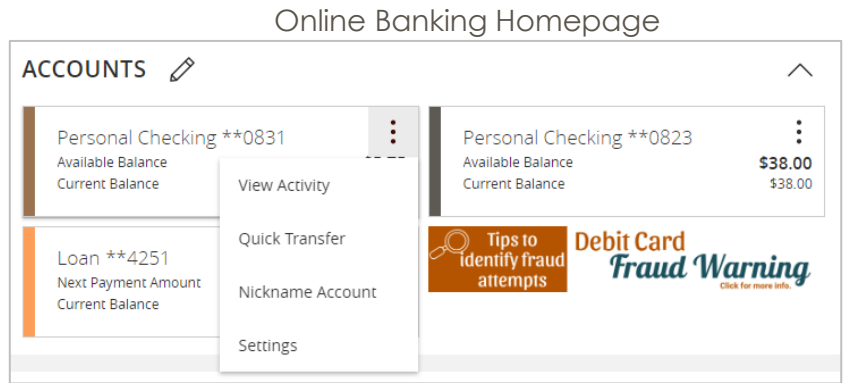
Questions? Call our customer support.
 Phone: 833-VERITEX (833-837-4839) or 469-443-9912

8. Click the vertical dots on an account to view additional options.

a. View Activity – Brings up the Account Details & History page.

b. Quick Transfer – Automatically designates the 'From Account' according to the account selected.

c. Account Nickname – Add a nickname to the account selected.



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Online Banking Homepage

d. Settings – Brings up account details and setting options.

Personal Checking **0831 \$5.75 Current Balance | \$5.75 Available Balance

Last Updated: June 24, 2020 11:05 AM

Transactions Details

Details

- Available Balance \$5.75
- Average Collected Balance \$1.20
- Current Balance \$5.75
- Last Deposit Date Jun 23, 2020
- Last Statement Date May 31, 2020
- Last Statement Balance \$1.00
- Collected Balance \$5.75
- Average Ledger Balance \$1.20
- Yesterday's Balance \$5.75
- Last Activity Date Jun 23, 2020

Settings

- Account Visibility Home

NOTE: You can click on the 'Transactions' tab to view transactions for that account.

Personal Checking **0831 \$5.75 Current Balance | \$5.75 Available Balance

Last Updated: June 24, 2020 11:05 AM

Transactions Details

Search transactions

Date	Description	Amount
JUN 23 2020	Transfer to Checking XX4790 fr om Checking XX0831 Funds Trans	(\$0.25) \$5.75
JUN 23 2020	ACH Single Test USER 9760752296 \EFFDAT ID # - 9760752296 TRACE # - 11302416000001	(\$0.15) \$6.00

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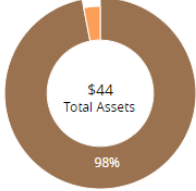
9. Select and drag an account to the tray icon which appears at the bottom right side of the screen to create a new account group.

Online Banking Homepage

Accounts ⌵

<p>Personal Checking **0831 ⋮</p> <p>Available Balance \$0.75</p> <p>Current Balance \$0.75</p>	<p>Personal Checking **0823 ⋮</p> <p>Available Balance \$43.00</p> <p>Current Balance \$43.00</p>
<p>Loan **4251 ⋮</p> <p>Next Payment Amount \$1,000.00</p> <p>Current Balance \$28,000.00</p>	<div style="display: flex; align-items: center;"> <div style="background-color: #004a7c; color: white; padding: 5px; font-size: 0.8em; margin-right: 10px;">Secure Solutions for your Business</div> <div style="text-align: center;"> <p>Tools to Prevent Business Fraud</p> <p><small>Click for more info.</small></p> </div> </div>

Asset Summary ⌵



\$44
Total Assets

98%


Personal Checking
xxxxx0823 98.29%

Available Balance \$43.00

Current Balance \$43.00

[View Transactions](#)

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10. You can name the 'New Group' and click on the 'Check Mark' to save. Additional accounts may be dragged into the new group or additional groups created.

New Group ✕ ✓ ⌵

<p>Personal Checking **0831 ⋮</p> <p>Available Balance \$4.50</p> <p>Current Balance \$4.50</p>	
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11. You can rename a group by clicking on the 'Pencil'.

VACATION ACCOUNTS ✎ ⌵

<p>Personal Checking **0831 ⋮</p> <p>Available Balance \$4.50</p> <p>Current Balance \$4.50</p>	<p>Personal Checking **0823 ⋮</p> <p>Available Balance \$38.00</p> <p>Current Balance \$38.00</p>
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