

Frequently Asked Questions & Answers

Re: Cooperative Center FCU Online Banking Update

Q: Why is the credit union migrating Online Banking?

A: During conversion to our new banking software, credit union members expressed concerns regarding layout. The new version is modern, clean and easy to use!

Q: What changes are included within the new version?

A: Just the look and feel of the application. There is not any new functionality in this release. Members can utilize the online banking in the same way you do today. The screen layout and design just looks different.

Q: Will I need to do anything to get the new version?

A: No. The look and feel will happen automatically and everything will carry over. Online banking member do not need to do anything.

Q: Will my settings and configurations change when with this new version?

A: No. Everything will move over seamlessly. The design and layout will just look different.

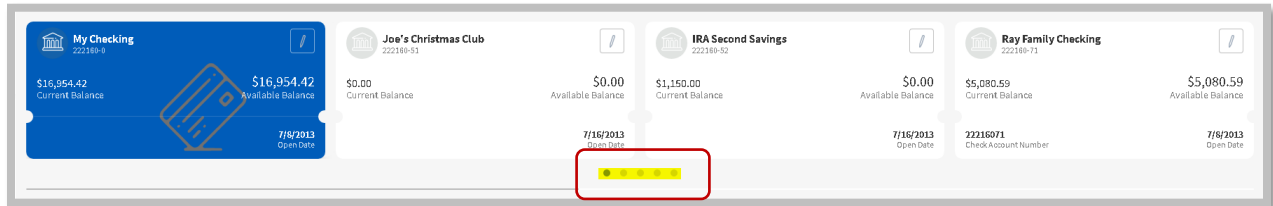
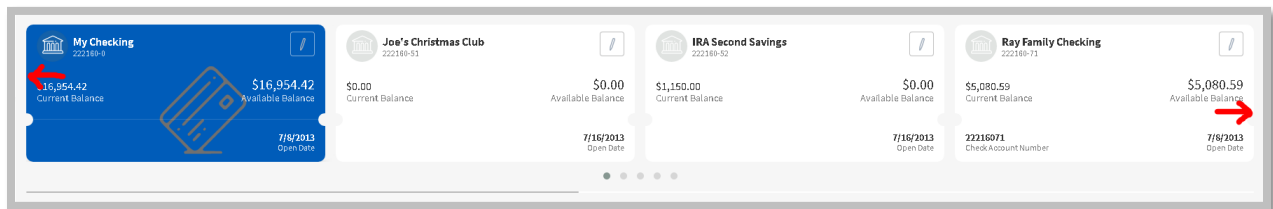
Q: Is the mobile banking design changing too?

A: No. Only Online banking will have a new version. The mobile banking application will not change.

Frequently Asked Questions & Answers by Members

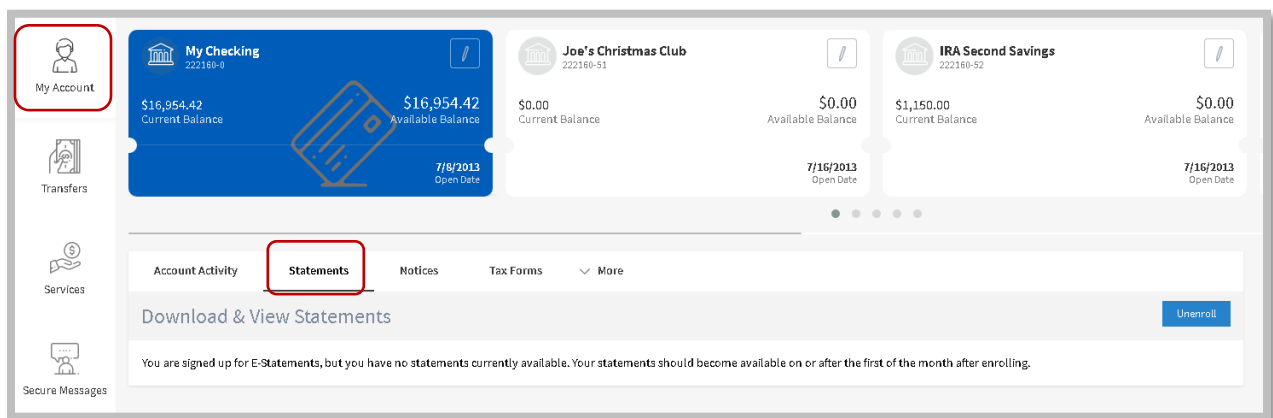
Q: I do not see all of my accounts?

A: If you do not see all of your suffixes, you have two options. The first option is to scroll through the Suffix Cards located on the top of the Screen on the **My Accounts** Section or the **Transfers** Sections. The second option is to select the grey circles centered below the Suffix Cards. If a member selects a circle it will take them directly to that Suffix Card.



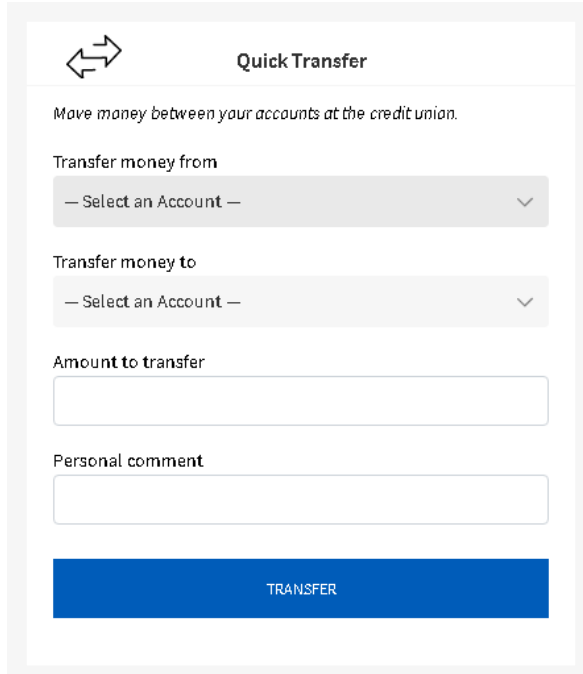
Q: Where are my Statements?

A: Statement are located under the **My Accounts** section



Q: Where do I do a One-Time Transfer?

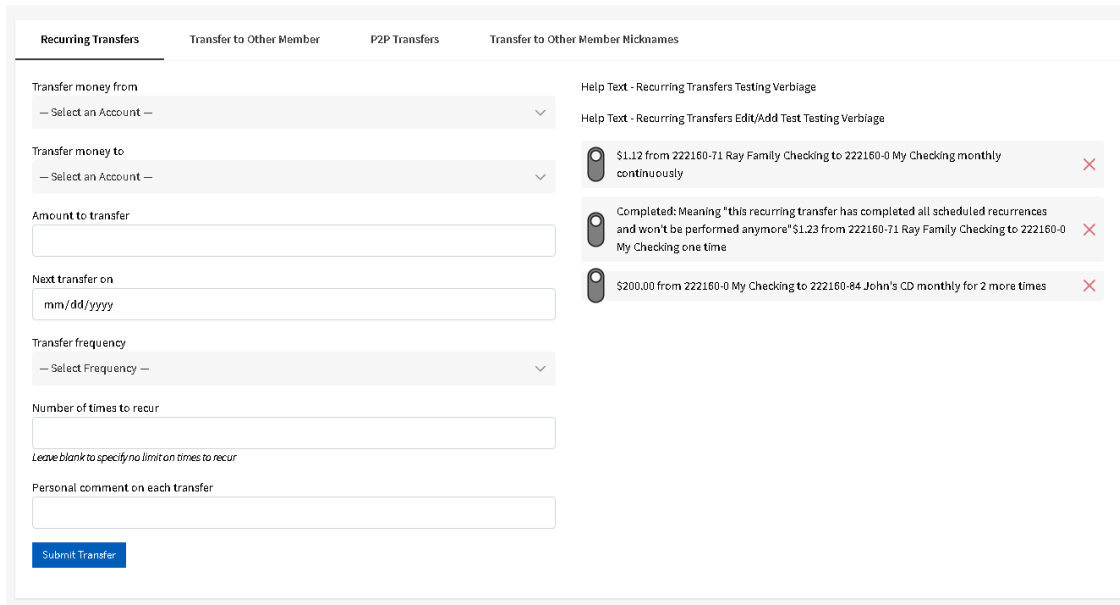
A: The One-Time transfer has a new name, **Quick Transfer**. The Quick Transfer box is located on the far right of the screen. You can view this box on the My Account landing page or within the Transfers section.



The screenshot shows a 'Quick Transfer' form with a double-headed arrow icon. The form includes the following fields: 'Transfer money from' (dropdown menu), 'Transfer money to' (dropdown menu), 'Amount to transfer' (text input), and 'Personal comment' (text input). A blue 'TRANSFER' button is located at the bottom of the form.

Q: Where do I find my Recurring or Scheduled Transfers?

A: To use the Recurring Transfer, you will select the Transfer button on the Main Menu then the Recurring Transfers option on the sub-menu. Here you can create a new recurring transfer or edit an existing recurring transfer.



The screenshot shows the 'Recurring Transfers' management page. It features a navigation bar with 'Recurring Transfers', 'Transfer to Other Member', 'P2P Transfers', and 'Transfer to Other Member Nicknames'. The main form includes fields for 'Transfer money from', 'Transfer money to', 'Amount to transfer', 'Next transfer on' (with a date format 'mm/dd/yyyy'), 'Transfer frequency', 'Number of times to recur', and 'Personal comment on each transfer'. A 'Submit Transfer' button is at the bottom. On the right side, there is a list of existing transfers with status indicators (radio buttons and red 'X' marks) and help text.

Transfer Description	Status
\$1.12 from 222160-71 Ray Family Checking to 222160-0 My Checking monthly continuously	Active
Completed: Meaning "this recurring transfer has completed all scheduled recurrences and won't be performed anymore"\$1.23 from 222160-71 Ray Family Checking to 222160-0 My Checking one time	Completed
\$200.00 from 222160-0 My Checking to 222160-84 John's CD monthly for 2 more times	Completed

Q: Where do I find my Member to Member Transfers?

A: To use the Member to Member Transfers, you will select the Transfer button on the **Main Menu** then the **Transfer to Other Member** option on the sub-menu. Here you can transfer money to another member by using the Transfer Nickname or Account Information.

Recurring Transfers **Transfer to Other Member** P2P Transfers Transfer to Other Member Nicknames

Transfer money from
— Select an Account —

Method to Locate Other Member
Use Member's Last Name and Account Number

First 2 letters of Last Name

Account Number

Suffix

Amount to transfer

Transfer comment

Submit Transfer

Q: Where is the Quicken export button?

A: To export Transactional data from online banking you will get to the **My Account** area, then Account Activity. There you will need to select the **Export** option and select the type of export you would like to use. Then select Download.

Account Activity Statements Notices Tax Forms More

Last updated 6/19/2019 8:09 AM

Quicken Format Quickbooks Format Microsoft Money **Excel**

Search Dates **Export** Print

Download

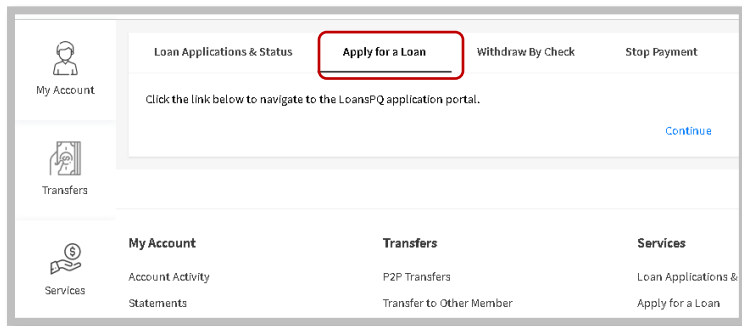
Date	Description	Memo	Amount	Ending Balance
5/22/2019	CONF # HB-05220800	TRANSFER FR 222160-071	\$1.12	\$16,954.42
4/22/2019	CONF # HB-04220451	TRANSFER FR 222160-071	\$1.12	\$16,953.30

Q: Where is Bill Pay?

A: Bill Pay is now located on the Main Menu Bar

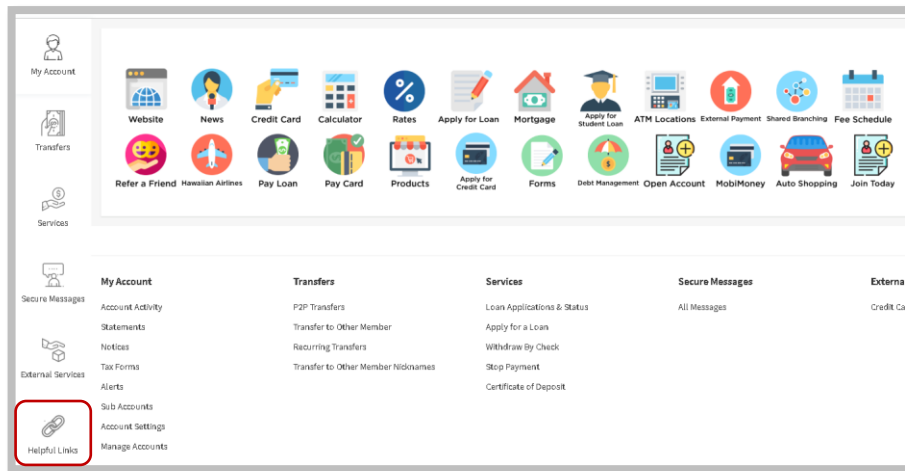
Q: Where do I go to Apply for a Loan?

A: To view or apply for a loan you will go to Services on the Main Menu, then select **Apply for a Loan** on the sub-menu. Once the page has loaded, click the Continue button to go to the Loan Application.



Q: Where do I get to the Links I used to use?

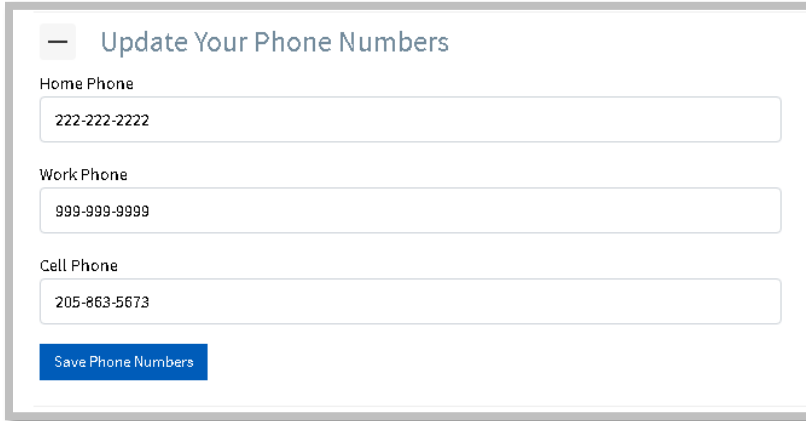
A: The external links are now located within the Helpful Links section. Click on the **Helpful Links** area located on the Main Menu and select the image of the URL they would like to go.



Q: Where do I change my Phone Number?

A: To update the email address within online banking, go to **My Account > Account Settings >** and click on the **Update Your Phone Numbers**. This will then open an area to send a notification to the credit union that you would like a change to your number.

NOTE: The Account Settings will either be on the main sub-menu or be listed under the more option.



— Update Your Phone Numbers

Home Phone
222-222-2222

Work Phone
999-999-9999

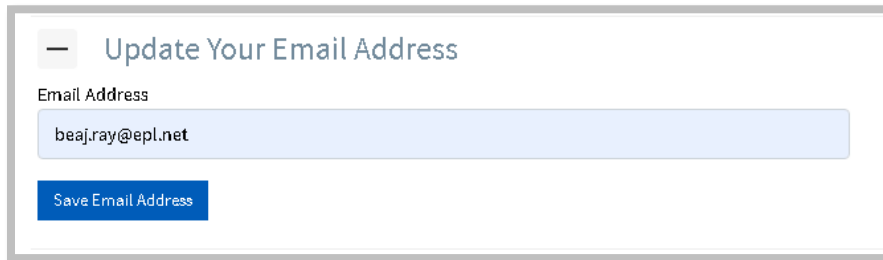
Cell Phone
205-863-5673

Save Phone Numbers

Q: where do I change my Email?

A: To update the email address within the online banking tool, go to **My Account > Account Settings >** and click on the **Update Your Email Address**. This will then open an area to send a notification to the credit union you would like a change to your email.

NOTE: The Account Settings will either be on the main sub-menu or be listed under the more option.



— Update Your Email Address

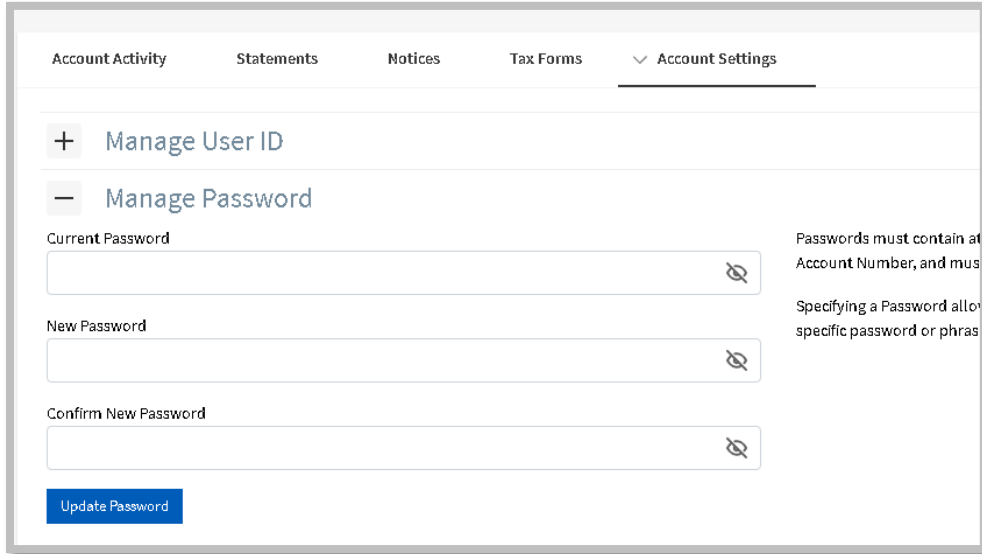
Email Address
beaj.ray@epl.net

Save Email Address

Q: Where do I change my Password?

A: To change or update the password for the account, the member will go to **My Account > Account Settings >** and click on the **Manage Password**. This will then open up an area to edit the password on the account.

NOTE: The Account Settings will either be on the main submenu or be listed under the more option.

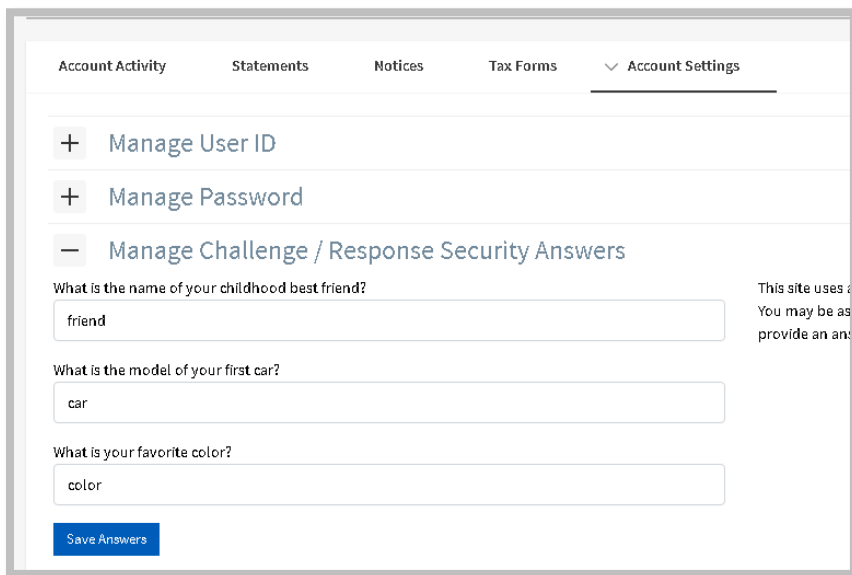


The screenshot shows a web interface with a top navigation bar containing 'Account Activity', 'Statements', 'Notices', 'Tax Forms', and 'Account Settings'. The 'Account Settings' menu is expanded, showing options for 'Manage User ID' and 'Manage Password'. The 'Manage Password' option is selected and expanded to show a form with three input fields: 'Current Password', 'New Password', and 'Confirm New Password'. Each field has a password icon (an eye with a slash) on the right. To the right of the form, there are two lines of text: 'Passwords must contain at least 8 characters, including an uppercase letter, a lowercase letter, a number, and a special character.' and 'Specifying a Password allows you to create a specific password or phrase.' At the bottom left of the form is a blue button labeled 'Update Password'.

Q: Where do I change my Security Questions?

A: To update the security questions for the account, the member will go to **My Account > Account Settings >** and click on the **Manage Challenge/Response Security Answers**. This will then open up an area to edit the security questions on the account.

NOTE: The Account Settings will either be on the main submenu or be listed under the more option.



The screenshot shows a web interface with a top navigation bar containing 'Account Activity', 'Statements', 'Notices', 'Tax Forms', and 'Account Settings'. The 'Account Settings' menu is expanded, showing options for 'Manage User ID', 'Manage Password', and 'Manage Challenge / Response Security Answers'. The 'Manage Challenge / Response Security Answers' option is selected and expanded to show a form with three questions and their corresponding input fields: 'What is the name of your childhood best friend?' with the answer 'friend', 'What is the model of your first car?' with the answer 'car', and 'What is your favorite color?' with the answer 'color'. To the right of the form, there are two lines of text: 'This site uses cookies to enhance your navigation. You may be asked to provide an answer to a security question.' At the bottom left of the form is a blue button labeled 'Save Answers'.

Q: Where do I go to change or hide my Suffixes?

A: To manage the Suffixes, the member will go to **My Account > Manage Accounts >** and click on the **Hide Suffixes** Menu Bar. This will then open up an area to edit the suffixes on the member’s account.

NOTE: The Manage Accounts will either be on the main submenu or be listed under the more option.

