

New Features and Enhancements – September 22, 2021

This guide will provide information on new features and enhancements in the September 22 online and mobile banking update.

Click a link below to go directly to that topic.

[New Mobile Quick Balance View](#)

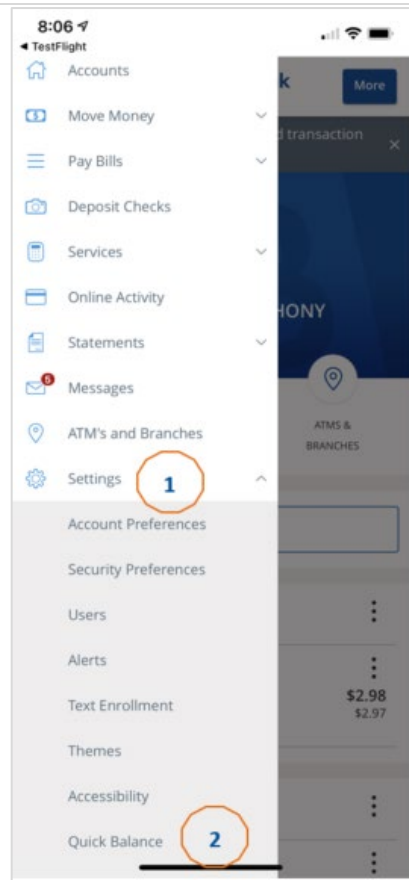
[Funds Transfer Updates](#)

[Account Details View](#)

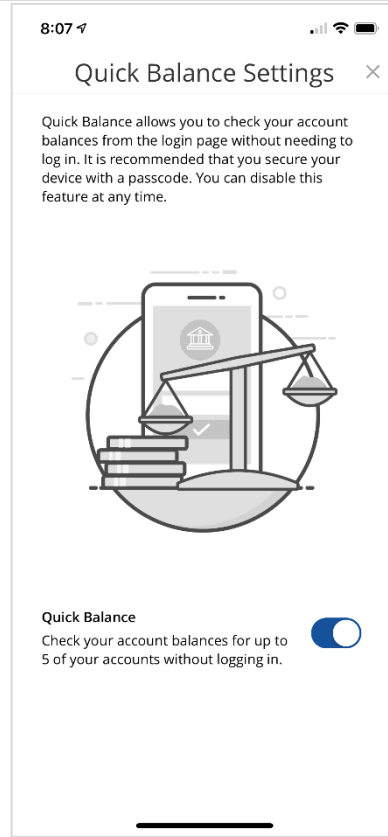
[Push Alert Notifications](#)

New Mobile Quick Balance View

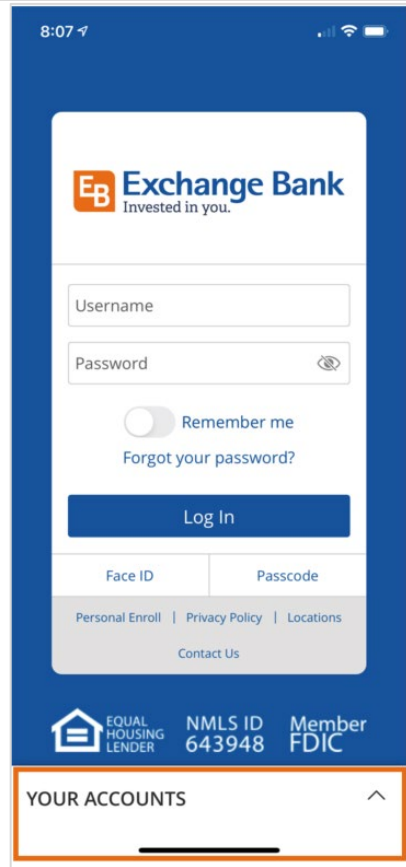
1. To enable the *Mobile Quick Balance* feature, navigate to **Settings**, then choose **Quick Balance**.



2. Enable the *Quick Balance* slider button and close the *Quick Balance Settings* screen.



3. The *Your Accounts* tab will then appear at the bottom of the Mobile App login screen.



4. Tapping the *Your Accounts* tab will display the balances of up to five accounts without logging in.

YOUR ACCOUNTS ▼

EMPLOYEE CKG
Updated August 23, 08:07 AM

Available Balance	\$2.98
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Close

Funds Transfer Updates

We've made some improvements to the most frequently used transactions in online banking – funds transfers. You can now edit single and recurring transfers if both of the following apply:

- The process date of transfer (or at least one transaction in the series) is in the future.
- The transfer is not in a canceled, failed, or processed status.

Then...	Now...
<p>Previously, to modify a transfer, you had to copy the existing transaction, make changes, and then cancel the previous transaction.</p>	<p>Now you can edit internal and external transfers for future-dated, one-time transfers, single instances of a recurring transfer, as well as the master of a recurring series.</p> <p>The internal transfers edit function also supports loan payments made on the <i>Funds Transfer</i> page.</p>

Activity Center

Single Transactions Recurring Transactions Deposited Checks

Search transactions

Created	Status	Transaction Type	Account	Amount	
6/19/2018	Authorized	Funds Transfer - Tracking ID: 25350	Checking XXXXXX6578	\$1.12	
6/19/2018	Authorized	Funds Transfer - Tracking ID: 25348	Checking XXXXXX6578	\$1.14	Actions
6/13/2018	Processed	Funds Transfer - Tracking ID: 24019	Checking XXXXXX2868	\$25	
6/8/2018	Processed	Funds Transfer - Tracking ID: 23896	Checking XXXXXX2868	\$85	
6/8/2018	Processed	Funds Transfer - Tracking ID: 23895	My business XXXXXX3240	\$85	
6/8/2018	Processed	Funds Transfer - Tracking ID: 23894	Checking XXXXXX2868	\$75	

Edit Single Transfer

ⓘ Editing single transfer to **Savings (XXXXXXXX127)** on **06/20/2018**. Updating a single transfer will not affect the recurring series. [Click to edit recurring series.](#)

Edit Recurring Transfer

ⓘ Editing **weekly** series to **Savings (XXXXXXXX127)**. Updating recurring transfers will affect all future transfers including already scheduled or authorized transfers. [Click to edit next occurrence on 06/20/2018.](#)

For individual transfers, you can now change the following information:

- *From Account*
- *To Account*
- *Transfer Date*
- *Amount*
- *Memo*

For recurring transfers, you can now change:

- *From Account*
- *To Account*
- *Transfer Amount*
- *Frequency*
- *Repeat Duration / End date*
- *Memo*

Funds Transfer

From Account

To Account

Amount

Frequency

Weekly

One time transfer

1st of the month

Last day of the month

1st & 15th of the month

15th & last day of the month

Weekly

Every other week

Monthly

Quarterly

Semi-annually

Yearly

ⓘ Transfers falling on a Sunday or banking holiday will be processed the following business day.

Repeat Duration
 Forever (Until I cancel)
 Until date (Set an end date)

Memo (optional)

Transfer Funds

Search transactions

All Pending Processed

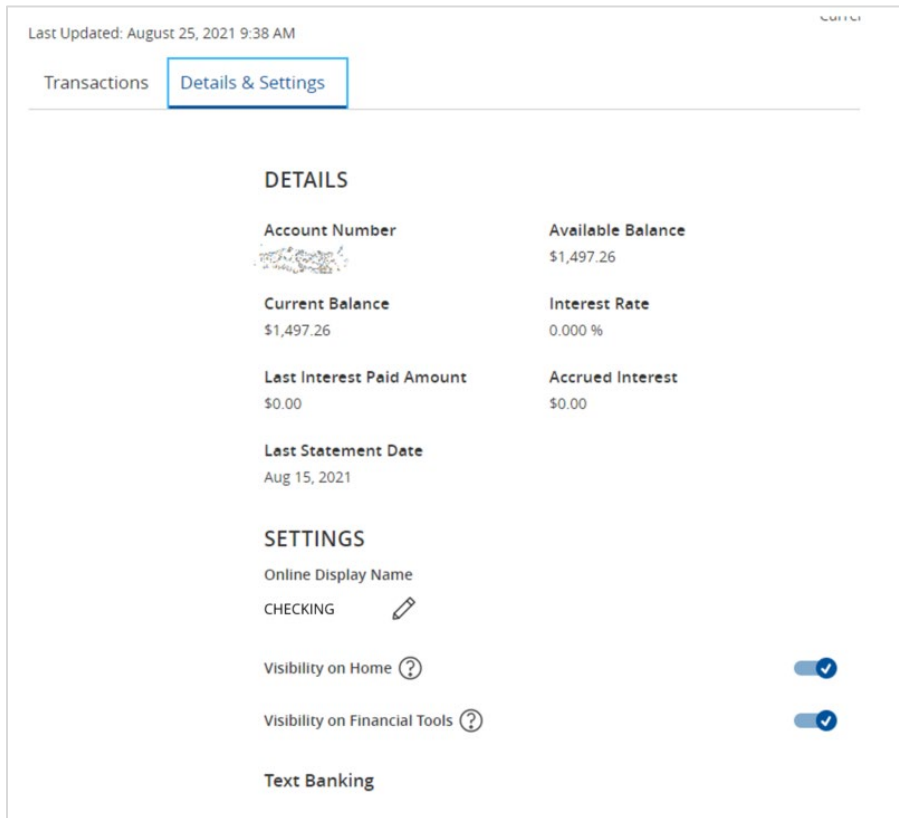
8/1/2018 Funds Transfer ✓ Authorized	#25348 \$1.14
6/20/2018 Funds Transfer ✓ Authorized	#25350 \$1.12

New options allow you to:

- Select the frequency of a transfer independent of the start date.
- Select any start date from the current date forward. The system will determine the next available transfer date that matches your criteria and will generate the first transaction of the series accordingly.
- Select a day of the week when *Weekly* or *Every other week* options are chosen.

Account Details View

You can now view the details of an account by clicking on the *Details & Settings* tab at the top of the screen. You can also select to view this information on the Home Page and when using the financial tools options.




Last Updated: August 25, 2021 9:38 AM


Transactions **Details & Settings**


DETAILS

Account Number [Redacted]	Available Balance \$1,497.26
Current Balance \$1,497.26	Interest Rate 0.000 %
Last Interest Paid Amount \$0.00	Accrued Interest \$0.00
Last Statement Date Aug 15, 2021	

SETTINGS

Online Display Name
CHECKING 

Visibility on Home 

Visibility on Financial Tools 

Text Banking

Push Alert Notifications

In addition to receiving account alerts via email, text, secure message, or voice, you now have the choice to receive the alert directly to your cell phone. This is a push notification now available in the Alerts drop down menu.

New Account Alert

Account

Please select an account to see available fields.

Amount

More Than Less Than Exactly

\$ 0.00

Alert Delivery Method

- Email
- Voice
- SMS Text Message
- Push Notification
- Secure Message Only

Here is an example of the new push notification:

