



2021  
Enhanced Online  
Banking  
Quick Start Guide

October 2021

# Enhanced Online Banking Experience

We are excited to announce that on **Sunday, October 24, 2021**, we will be releasing an enhanced Online Banking experience! To help you prepare for these changes, we've put together an overview of the changes and exciting new features coming your way.





**NOTE:** Colors shown in the images may not represent the colors displayed in the Online Banking experience release in October.

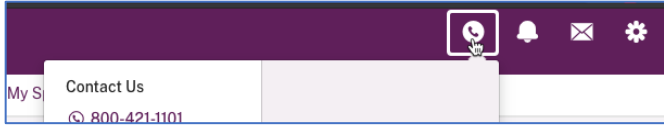

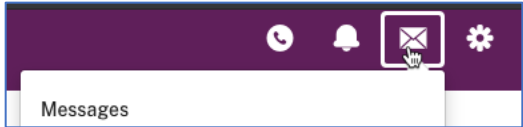

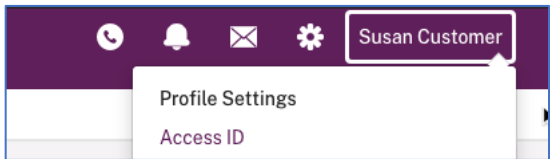
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## Enhanced Design

### Overview Page

- The **Home** page has now been updated to the **Overview** page. Here's a quick overview of the changes you will see:
  - The new page has 2 columns – Accounts and Widgets.
  - Your accounts are listed in the left column (both BankORION accounts and Outside accounts.)
  - The new column on the right side of the page displays widgets available to you.
  - Easily access BankORION **contact information** by clicking the phone icon  anywhere you are during your Online Banking session.
  - **Alerts & Messages** are still accessible from the top of any page within Online Banking by clicking the bell or email icons.  
  - **Services & Settings** previously accessed by clicking the “Contact Us” link is now accessible by clicking the gear icon  at the top of any page within Online Banking. The options will display in a dropdown when the icon is clicked.
  - **Spendable Balance** is now located on the right side of the Overview page in the widgets columns as its own widget.
  - **Log Out:** The log out option is now displayed under the nickname dropdown where your profile nickname is displayed along with your Profile Settings.

<p><b>Contact Information</b></p>	 <p>A screenshot of a dark purple navigation bar. From left to right, it contains a telephone icon, a bell icon, an envelope icon, and a gear icon. A white dropdown menu is open under the telephone icon, showing the text "My S", "Contact Us", and "800-421-1101". A red box highlights the telephone icon.</p>
<p><b>Alerts</b></p>	 <p>A screenshot of a dark purple navigation bar with a telephone icon, a bell icon, an envelope icon, and a gear icon. A white dropdown menu is open under the bell icon, showing the text "Alerts". A red box highlights the bell icon.</p>
<p><b>Messages</b></p>	 <p>A screenshot of a dark purple navigation bar with a telephone icon, a bell icon, an envelope icon, and a gear icon. A white dropdown menu is open under the envelope icon, showing the text "Messages". A red box highlights the envelope icon.</p>
<p><b>Services &amp; Settings</b></p>	 <p>A screenshot of a dark purple navigation bar with a telephone icon, a bell icon, an envelope icon, and a gear icon. A white dropdown menu is open under the gear icon, showing the text "Services &amp; Settings". A red box highlights the gear icon.</p>
<p><b>Log Out &amp; Profile Settings</b></p>	 <p>A screenshot of a dark purple navigation bar with a telephone icon, a bell icon, an envelope icon, a gear icon, and a user profile box labeled "Susan Customer". A white dropdown menu is open under the user profile box, showing the text "Profile Settings" and "Access ID". A red box highlights the user profile box.</p>

## Accounts Page

- The accounts page has been designed to display more information in an easier to view format.
- Links previously shown on the right side at the top of the page are now displayed as sub-tabs along with the existing Activity sub-tab.
- Primary account balances will display at the top right corner of the page.
- Additional details regarding the accounts can be accessed by clicking the link (*More Details*) under the Account Name/Nickname on the top left of the page.

The screenshot displays the 'Accounts' page for a 'Main Family Checking Account'. The account balance is \$23,529.17, available as of 3/11/2021 12:00 AM. The page includes navigation tabs for Activity, Cards, Alerts, Statements & Documents, Stop Payment, and Future View. A search bar and date range filter (02/01/2021-02/09/2021) are present above a table of transactions.

Date	Description	View All	Category	Credit   Debit	Balance
02/26/2021	Regular Deposit		Deposit	+100.00	\$10,125.00
07/21/2021	Check # 6027		Other	-100.00	\$10,125.00
09/16/2021	ATM Withdrawal took out a whole bunch of cash to party with the gang		Cash/ATM	-500.00	\$10,125.00
02/05/2021	Regular Deposit		Deposit	+100.00	\$10,125.00

## Move Money (use the Pay Someone feature to move money to friends)

- The Move Money page where you conduct transfer contains the same functions and options you are used to using each day.

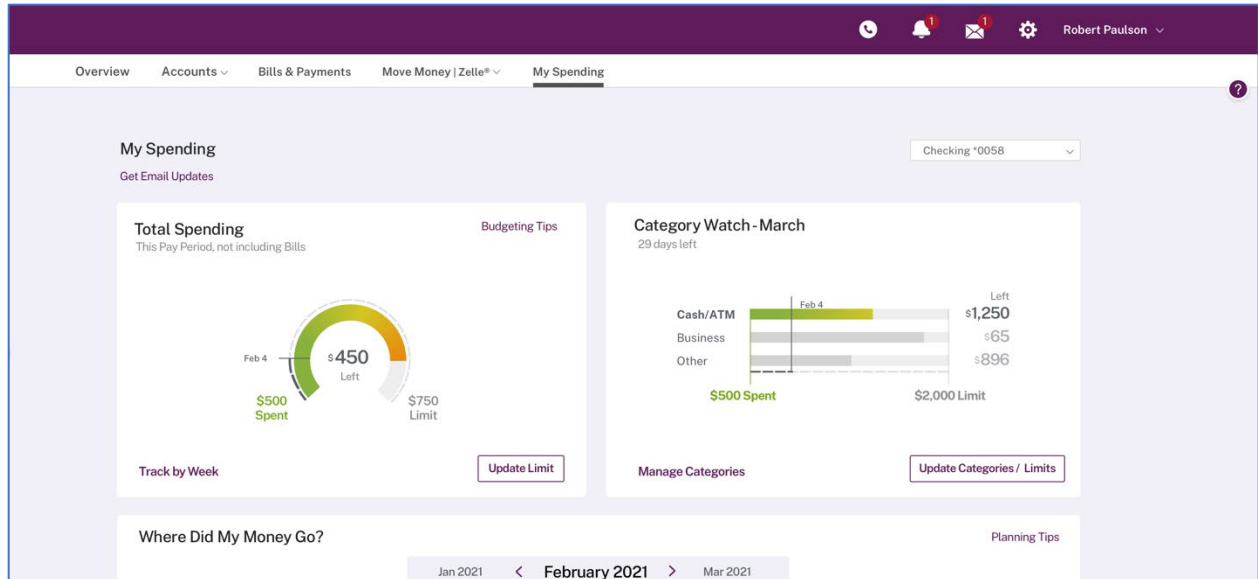
The screenshot shows the 'Move Money' page with a dropdown menu open for 'Schedule Single Transfer'. The form includes fields for From (Shek Checking \*0058, Balance: \$968.00), To (Shek Checking \*0058, Balance: \$968.00), Transfer Description, Amount (\$ 0.00), Frequency (One-Time), Period (Once), Scheduled Date (03/01/2021), and Recurring Until. A checkbox for 'Create transfer template after this transfer is submitted' is present, along with a 'Cut-off Time: 3:30 pm CST'.

Recent Transfers:

Transfer Description	Amount	Date	Actions
From: Line of Credit 8810974 To: Savings *4174	\$1,250.00		I want to v
test From: Checking *9999 To: Loan *0653 Until Canceled	\$1,500.00	03/09/2021	I want to v

## My Spending

- The Category Watch widget (just as on the Overview page) has a new design using bars for the day-to-day progress.



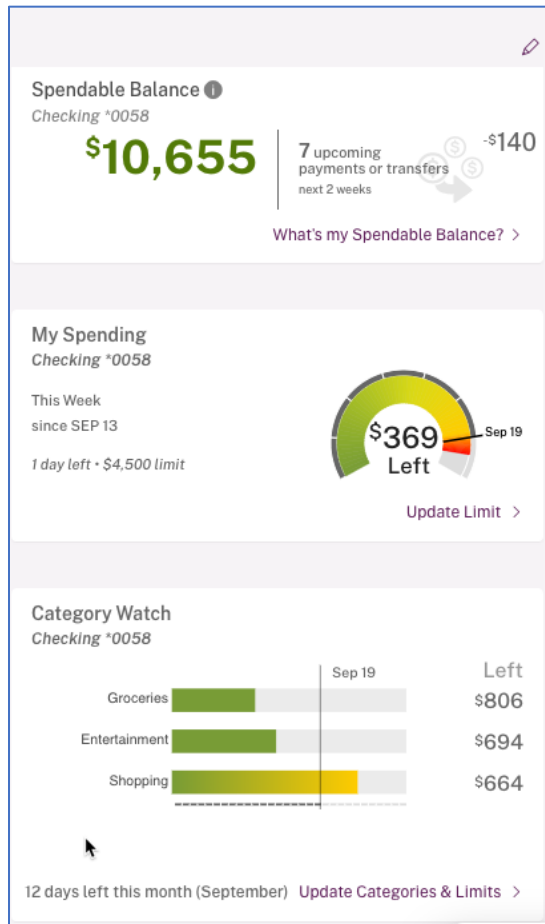
## New Features in your Enhanced Online Banking experience!

### Widgets (Overview page)

- Provide direct access to more information and data.
- You can personalize the information and access to features you use most and even reorder and hide most widgets.

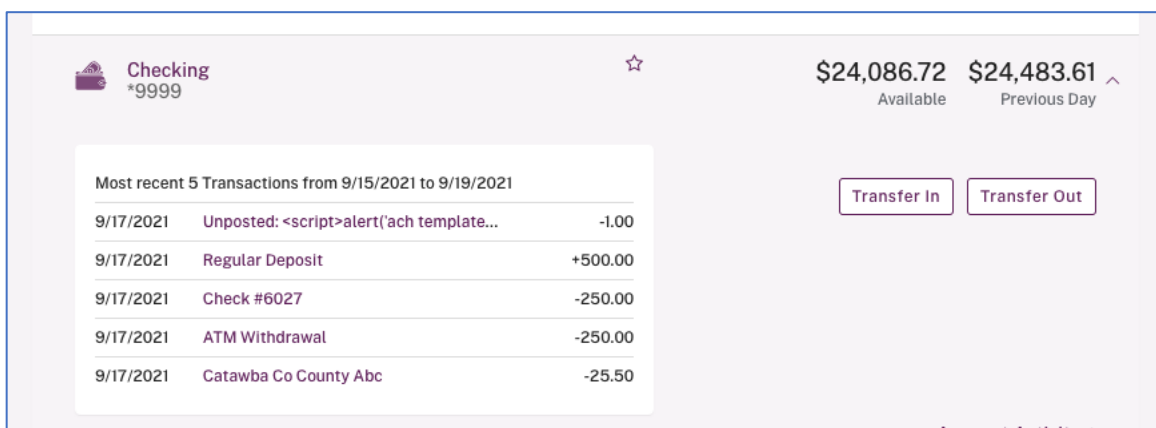
#### Widgets Supported

- Spendable Balance *(for consumers only)*
- My Spending *(for consumers only)*
- Category Watch *(for consumers only)*
- Pending Transfers *(for consumers and businesses)*
- Unread Messages *(for consumers and businesses)*



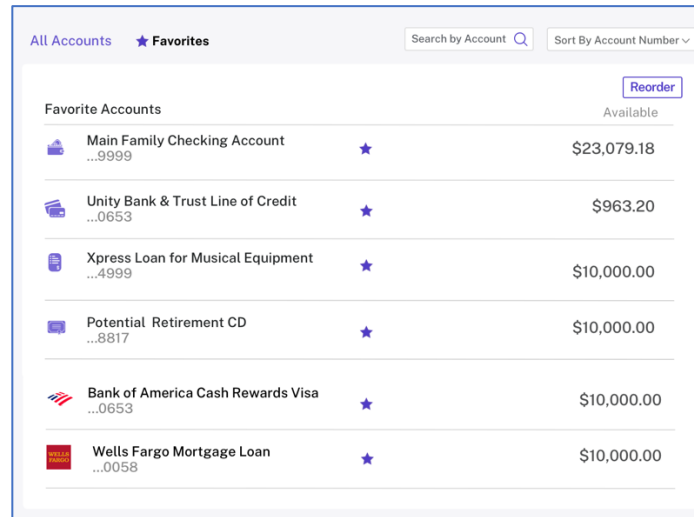
## QuickView







- Allows you to move from account to account and view recent activity and available actions without ever leaving the Overview page.
- Displays the most recent 5 transactions on an account (both BankORION and Outside).
- Clicking a transaction displays the transaction modal for quick editing of the transaction on BankORION accounts.



## Accounts Favorites (Consumers Only)

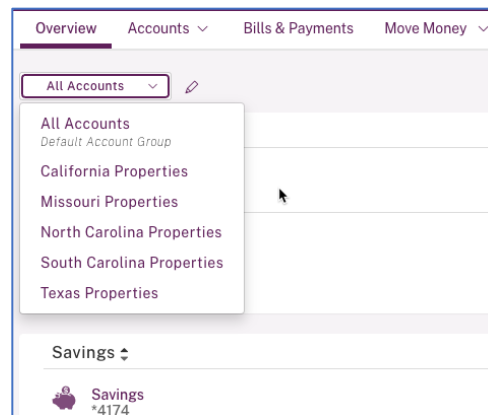
- Favorites allow you to create a subset of your accounts to view by default or at any time versus the *All Accounts* list.
- You are now able to select Outside accounts to be included in your list of Favorite accounts.



Favorite Accounts		Reorder
		Available
	Main Family Checking Account ...9999	\$23,079.18
	Unity Bank & Trust Line of Credit ...0653	\$963.20
	Xpress Loan for Musical Equipment ...4999	\$10,000.00
	Potential Retirement CD ...8817	\$10,000.00
	Bank of America Cash Rewards Visa ...0653	\$10,000.00
	Wells Fargo Mortgage Loan ...0058	\$10,000.00

## Account Groups (Businesses Only)

- Ends the frustration of searching for specific related accounts in a long list of accounts.
- You can create a subset of accounts (both BankORION accounts and Outside accounts) that can be used for viewing only those accounts on the Overview page, as well as using those groups for Cash Management features in the future.















## Manage Account Groups

Account groups may contain any type of accounts including outside accounts. However, specific features like Overview Page may only be able to use certain account types.

[+ New Group](#)

	Edit	Delete	Default ⓘ
<b>All Accounts</b>			<input checked="" type="radio"/>
California Properties			<input type="radio"/>
Missouri Properties			<input type="radio"/>
North Carolina Properties			<input type="radio"/>
South Carolina Properties			<input type="radio"/>
Texas Properties			<input type="radio"/>