

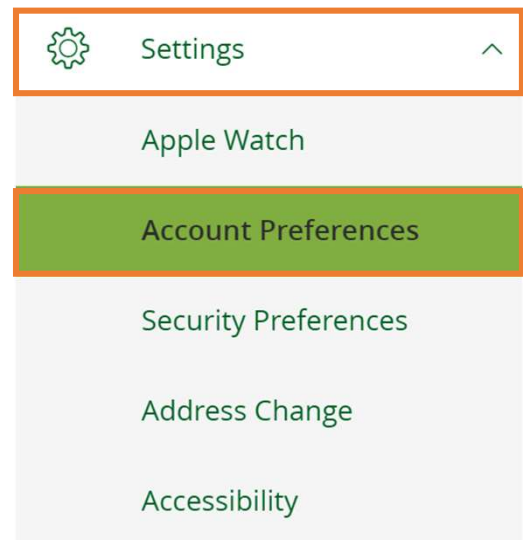
Q2 Account Preferences- Hiding, Sorting, Grouping & Nicknaming

Our new online banking platform gives us visibility to all accounts our Social Security Number is tied to. If you would like to arrange your accounts in a different format than the default, below are three options to customize your view.

Hiding Accounts from the Home Screen

This option will remove the account from the Home Screen but still allow you to transact on the account via available options within online banking, such as Funds Transfer.

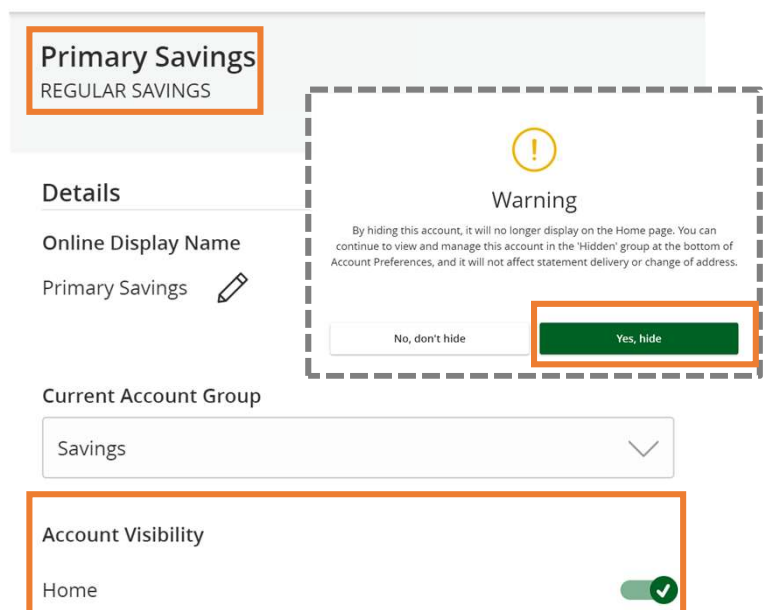
From the Menu on the left-hand side, click on **Settings**→**Account Preferences**.



Click on the Title of the account you wish to hide. *The view will expand.*

Under Account Visibility, click on the **slide bar** to Hide the account from the Home Screen.

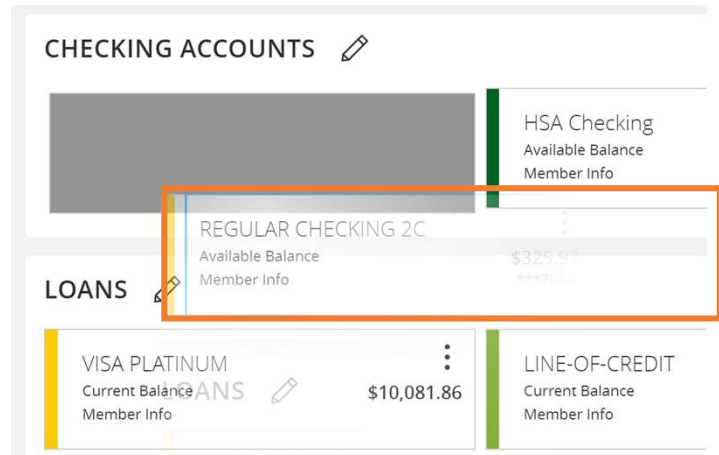
A pop-up Warning will ask if you wish to hide the account. Choose, **Yes, Hide.**



Sorting Accounts from the Home Screen

This option will allow you to move the accounts in any order you prefer.

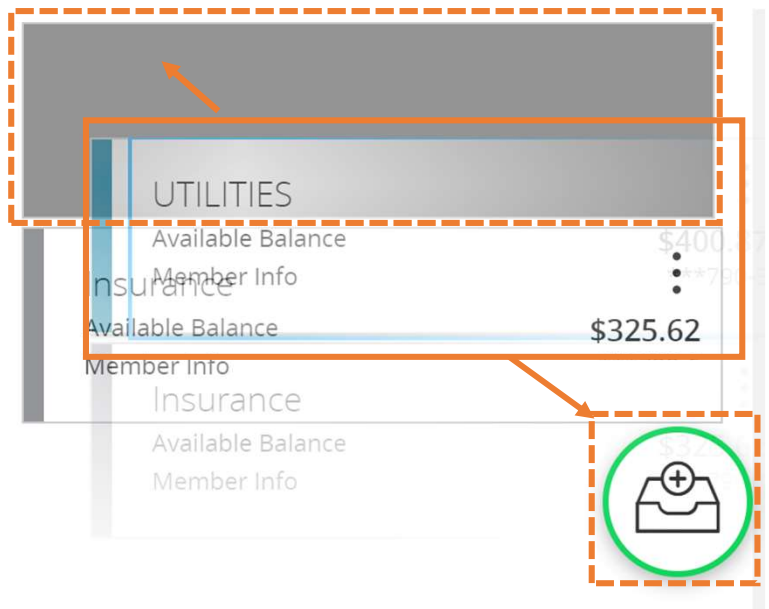
Click/Touch and hold on the account you wish to move, then drag and drop it to the preferred location.



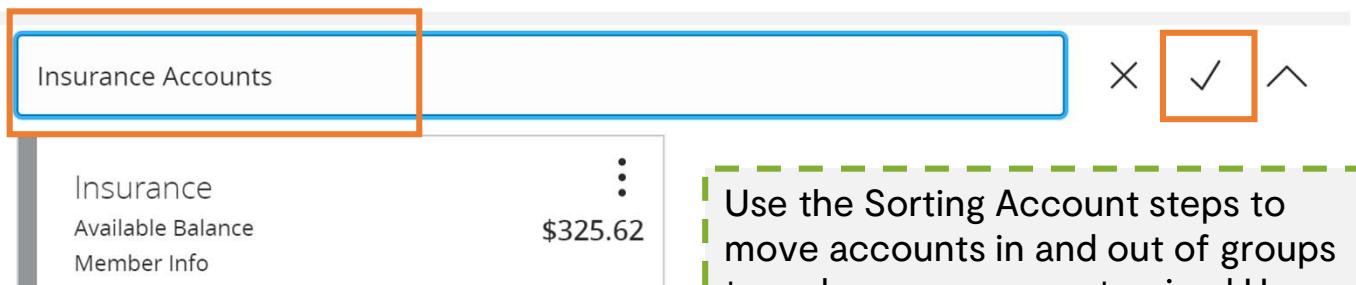
Grouping Accounts from the Home Screen

This option will allow you to group your accounts. You can do this by member number, loans vs. accounts, etc.

Click/Touch and hold on the account you wish to move, then drag and drop it over the Grouping Icon.



Name the Account Group as you choose and click the Check Mark to save.

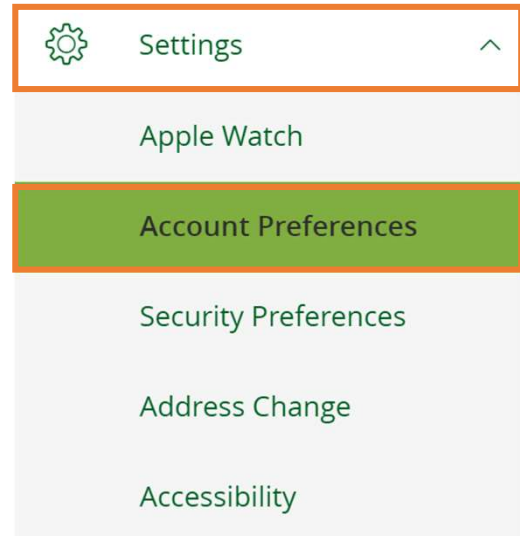


Use the Sorting Account steps to move accounts in and out of groups to make your own customized Home Page view!

Nicknaming Accounts

This option will allow you to nickname the account, so you can easily identify it from the home screen.

From the Menu on the left-hand side, click on **Settings** → **Account Preferences**.



Click on the Title of the account you wish to nickname. *The view will expand.*

Click on the **Pencil** next to the Account title.



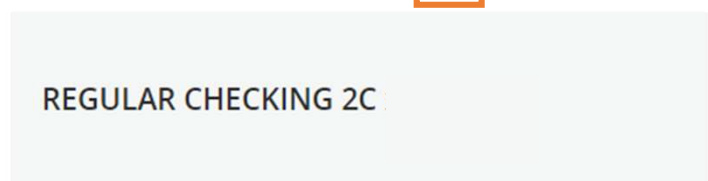
Details

Online Display Name

REGULAR CHECKING 2C



The field will now be editable. **Change the title** to the preferred name. **Click the checkmark** when finished.



Details

Online Display Name

Jane's Checking



CHECKING ACCOUNTS

You will see the account with the new nickname displayed on the home screen.

