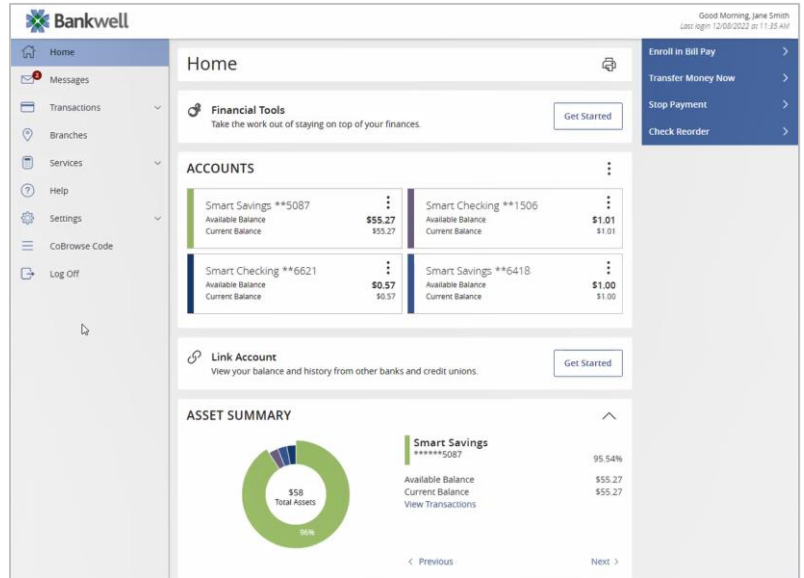


1. View a listing of accounts accessible within Digital Banking.
2. Shortcuts to frequently visited areas like 'Bill Pay' and 'Transfer Money Now', are located on the right side of the screen.
3. Select 'Get Started' in the 'Link Account' section to pull in information from other bank or credit union accounts.
4. Select 'Get Started' in the 'Financial Tools' section to manage your finances.
  - a. Net Worth
  - b. Budget
  - c. Spending
  - d. Trends
  - e. Debts



Good Morning, Jane Smith  
Last login: 12/08/2022 at 11:35 AM

Enroll in Bill Pay >  
Transfer Money Now >  
Stop Payment >  
Check Reorder >

**Home**

**Financial Tools**  
Take the work out of staying on top of your finances. [Get Started](#)

**ACCOUNTS**

Smart Savings **5087 Available Balance \$55.27 Current Balance \$55.27	Smart Checking **1506 Available Balance \$1.01 Current Balance \$1.01
Smart Checking **6621 Available Balance \$0.57 Current Balance \$0.57	Smart Savings **6418 Available Balance \$1.00 Current Balance \$1.00

**Link Account**  
View your balance and history from other banks and credit unions. [Get Started](#)

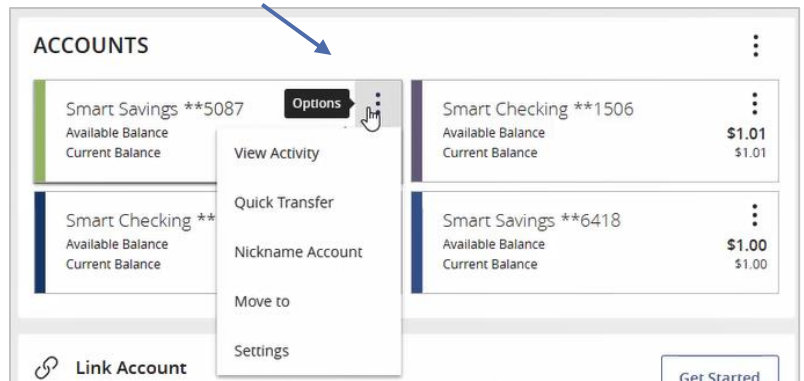
**ASSET SUMMARY**

Smart Savings \*\*\*\*\*5087 95.54%  
Available Balance \$55.27  
Current Balance \$55.27  
[View Transactions](#)

\$58 Total Assets 100%

< Previous Next >

5. Select the 'Options' icon next to each account to reveal multiple available quick actions.



**ACCOUNTS**

Smart Savings \*\*5087 **Options**

Available Balance  
Current Balance

Smart Checking \*\*1506  
Available Balance \$1.01  
Current Balance \$1.01

Smart Checking \*\*  
Available Balance  
Current Balance

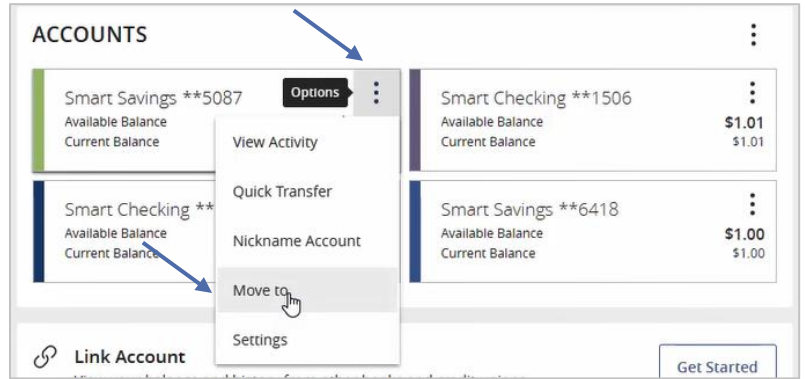
Smart Savings \*\*6418  
Available Balance \$1.00  
Current Balance \$1.00

**Link Account** [Get Started](#)

View Activity  
Quick Transfer  
Nickname Account  
Move to  
Settings

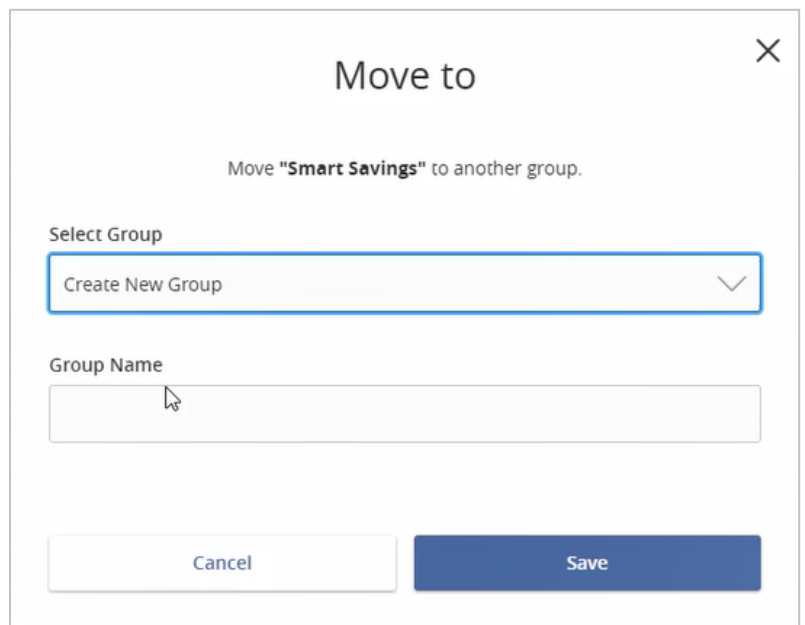


6. To create a grouping of accounts, click the 3-dot icon next to an account, then select 'Move to'.



7. Select 'Create New Group' in the 'Select Group' dropdown menu. Then enter the 'Group Name'.

8. Select 'Save'.



Alternatively, a new group can also be created by selecting an account and dragging it down the page to an envelope that will appear in the lower right corner of the screen.

**NOTE:** Additional account(s) may be moved into the newly created group or additional group(s) may be created if needed by repeating step 6.

9. Click on the pie graph at the bottom of the screen to view a distribution of funds across accounts accessible within Digital Banking.

