

Customer User Guide

Account Access Retail Online

This section provides customer access to accounts designated as Internet accessible.

Note: The information in each section may vary based on the financial institution's branding. All examples shown are from the Fiserv Retail Online Test Bank.

The Accounts Overview Page appears once the customer successfully logs on to Retail Online.

Welcome **Rutherford Hayes**
Last log in: Apr 14, 2015

Alerts **1** Mail Chat (offline) Profile Log out

MyFinancial, Inc.

Home Accounts Transfer Pay bills Budget

Home Accounts

Edit Accounts Print

Account Name	Account ID	Balance	Transfer	Recent
HOUSE ACCOUNT	x060	Available balance \$7,522.29	Transfer	Recent
Loan Account	2572	Payoff balance \$0.00	Transfer	Recent
Savings Account	x060	Current balance \$1,020.14	Transfer	Recent
Checking Account	x100	Available balance \$6,568.47	Transfer	Recent

Show all accounts

Pay bills

Pay Bills Popmoney

Payments you make in Pay Bills appear on the Payment Center in EPS Bill Payment Interop where you can view, change, or cancel them.

Payment Detail

Bill
Select a biller

Pay Date
Select a date

Amount
\$

Pay From
Checking *7000

Make Payment

popmoney
Send Money your way

Help Locations Contact Terms Privacy

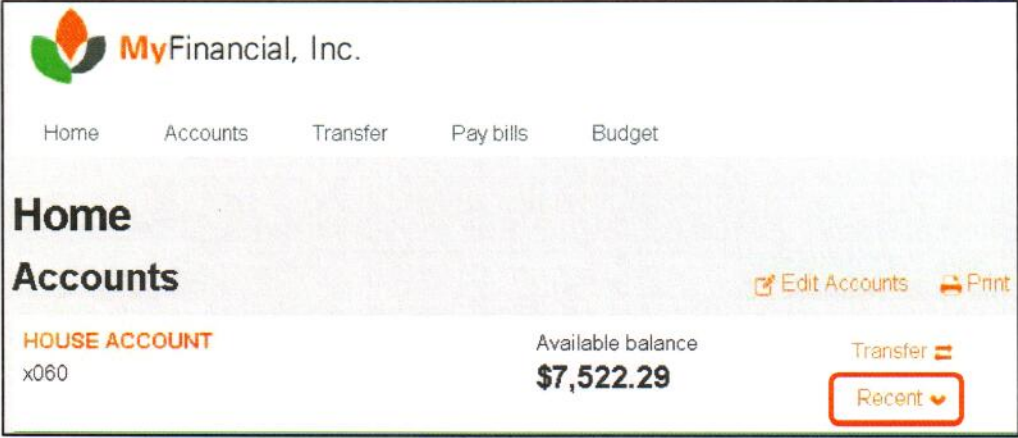
Member FDIC Equal housing lender

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Home Page access to Recent Transactions

Customers can access the last 10 transactions for an account.

- From the **Home** page, click **Recent**.



MyFinancial, Inc.

Home Accounts Transfer Pay bills Budget

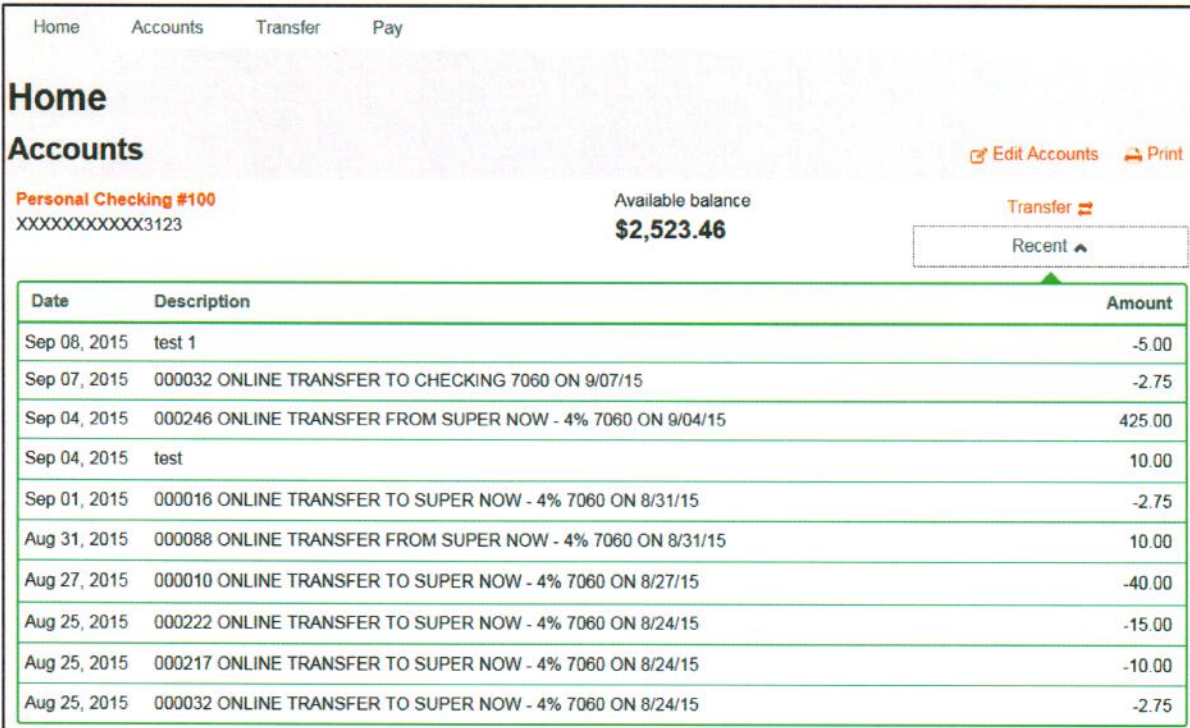
Home Accounts

HOUSE ACCOUNT
x060

Available balance
\$7,522.29

Edit Accounts Print Transfer Recent

All recent account activity appears.



Home Accounts Transfer Pay

Home Accounts

Personal Checking #100
XXXXXXXXXX3123

Available balance
\$2,523.46

Edit Accounts Print Transfer Recent

Date	Description	Amount
Sep 08, 2015	test 1	-5.00
Sep 07, 2015	000032 ONLINE TRANSFER TO CHECKING 7060 ON 9/07/15	-2.75
Sep 04, 2015	000246 ONLINE TRANSFER FROM SUPER NOW - 4% 7060 ON 9/04/15	425.00
Sep 04, 2015	test	10.00
Sep 01, 2015	000016 ONLINE TRANSFER TO SUPER NOW - 4% 7060 ON 8/31/15	-2.75
Aug 31, 2015	000088 ONLINE TRANSFER FROM SUPER NOW - 4% 7060 ON 8/31/15	10.00
Aug 27, 2015	000010 ONLINE TRANSFER TO SUPER NOW - 4% 7060 ON 8/27/15	-40.00
Aug 25, 2015	000222 ONLINE TRANSFER TO SUPER NOW - 4% 7060 ON 8/24/15	-15.00
Aug 25, 2015	000217 ONLINE TRANSFER TO SUPER NOW - 4% 7060 ON 8/24/15	-10.00
Aug 25, 2015	000032 ONLINE TRANSFER TO SUPER NOW - 4% 7060 ON 8/24/15	-2.75

Edit Accounts

Customers can customize the list of accounts that appear on the homepage. Customization controls enable users to specify account nicknames, the accounts that appear, and the order in which they display.

1. From the **Home** page, click **Edit Accounts**.

Home
Accounts

☒ Edit Accounts
 Print

Personal Checking #100 XXXXXXXXXXXX3123	Available balance \$2,523.46	Transfer Recent ▼
HSA 8050	Available balance \$4,838.96	Transfer Recent ▼

2. Complete and changes, and then click **Save**.

Home
Accounts

To hide an account from your account list, uncheck the "Show on home" checkbox. To change the order of accounts, click "Move" next the account to either move it up in the list or down. When you have finished making your changes, click "Save" at the bottom of your account list. To abandon your changes, click "Cancel".

Personal Checking #100 XXXXXXXXXXXX3123	<input checked="" type="checkbox"/> Show on home	Move ▼	
HSA 8050	<input checked="" type="checkbox"/> Show on home	Move ▲	Move ▼
MORTGAGE - 4% REPAY 2572	<input checked="" type="checkbox"/> Show on home	Move ▲	Move ▼
Vacation account 7060	<input checked="" type="checkbox"/> Show on home	Move ▲	Move ▼
CHRISTMAS CLUB XX0004	<input checked="" type="checkbox"/> Show on home	Move ▲	Move ▼
Certificate of Deposit1 XX1086	<input checked="" type="checkbox"/> Show on home	Move ▲	
CARD TYPE 2-00 XX0007	<input type="checkbox"/> Show on home		
Safe Deposit Box 4010	<input type="checkbox"/> Show on home		

Save

Cancel

Account Details

Transactions

The Transactions option provides access to account transaction information.

1. From the **Home** page, click the **Accounts** tab or click the Account Type link.
2. From the **Account** list, select the accounts.

MyFinancial, Inc.

Home Accounts Transfer Pay

Personal Checking #100 – XXXXXXXXXXXX3123 ▾

Details Transfer Documents Categorize Download Stop payments

Account information

Available balance **\$2,523.46** Current balance **\$2,523.46**

Transactions

☒ Scheduled ☐ Pending ☐ Posted

Search transactions

Amount **Print**

Date ▾	Description ▾	Amount ▾	Balance
Sep 06, 2015	test 1	5.00	2,523.46
Sep 07, 2015	000032 ONLINE TRANSFER TO CHECKING 7060 ON 9/07/15	-2.75	2,526.46
Sep 04, 2015	000246 ONLINE TRANSFER FROM SUPER NOW - 4% 7060 ON 9/04/15	425.00	2,531.21
Sep 04, 2015	test	10.00	2,106.21
Sep 01, 2015	000010 ONLINE TRANSFER TO SUPER NOW - 4% 7060 ON 8/31/15	-2.75	2,096.21
Aug 31, 2015	000088 ONLINE TRANSFER FROM SUPER NOW - 4% 7060 ON 8/31/15	10.00	2,098.96
Aug 27, 2015	000010 ONLINE TRANSFER TO SUPER NOW - 4% 7060 ON 8/27/15	-40.00	2,088.96
Aug 25, 2015	000222 ONLINE TRANSFER TO SUPER NOW - 4% 7060 ON 8/24/15	15.00	2,120.96
Aug 25, 2015	000217 ONLINE TRANSFER TO SUPER NOW - 4% 7060 ON 8/24/15	-10.00	2,143.96
Aug 25, 2015	000032 ONLINE TRANSFER TO SUPER NOW - 4% 7060 ON 8/24/15	-2.75	2,153.96

Date **Switch to range**

Definitions

Scheduled

The transaction is scheduled to post to the user's account; typically this date is one or more days in the future. Scheduled transactions are not yet reflected in either the current or available balances of the user's account.

Pending Transactions








The transaction is pending and has not yet posted. Pending transactions are reflected in the available balance of the user's account, but not in the account's current balance.

Posted Transactions

The transaction has posted. Posted transactions are already reflected in the user's current and available account balances.

Filter








The filter tool enables users to filter transactions based on status.

Transactions				
 Scheduled  Pending  Posted				
Date ▾	Description ▾	Ar		Balance
 Sep 08, 2015	test 1			523.46
 Sep 07, 2015	000032 ONLINE TRANSFER TO CHECKING 7060 ON 9/07/15	-2.75		2,528.46
 Sep 04, 2015	000246 ONLINE TRANSFER FROM SUPER NOW - 4% 7060 ON 9/04/15	425.00		2,531.21
 Sep 04, 2015	test	10.00		2,106.21

Note: An arrow after a column heading indicates users can sort transactions Date, Description or amount, with the icons indicating sort ability; running balances display when users sort transaction by date.

Print

The Print tool enables users to print the transactions that display on the Account detail page.

Transactions				
 Scheduled  Pending  Posted				
Date ▾	Description ▾	Amount ▾		Balance
 Sep 08, 2015	test 1	-5.00		2,523.46
 Sep 07, 2015	000032 ONLINE TRANSFER TO CHECKING 7060 ON 9/07/15	-2.75		2,528.46
 Sep 04, 2015	000246 ONLINE TRANSFER FROM SUPER NOW - 4% 7060 ON 9/04/15	425.00		2,531.21
 Sep 04, 2015	test	10.00		2,106.21

Transaction search

The search functionality enables users to search by date and Transaction Amount.

Transactions			
<div> Scheduled Pending Posted </div> <div> Filter Print </div>			
Date	Description	Amount	Balance
Sep 06, 2015	test 1	-5.00	2,523.46
Sep 07, 2015	000032 ONLINE TRANSFER TO CHECKING 7060 ON 9/07/15	-2.75	2,526.46
Sep 04, 2015	000246 ONLINE TRANSFER FROM SUPER NOW - 4% 7060 ON 9/04/15	425.00	2,531.21
Sep 04, 2015	test	10.00	2,106.21

Search transactions

Amount

Date Switch to range

Check Images

Customers can view their check and deposit images on the Transactions pages: Previous Statement, Current Statement, Since Last Login, Recent Transaction, and Current Business Day.

Note: The information within each inquiry may vary based on the financial institution's branding. All examples shown are from the Retail Online test bank.

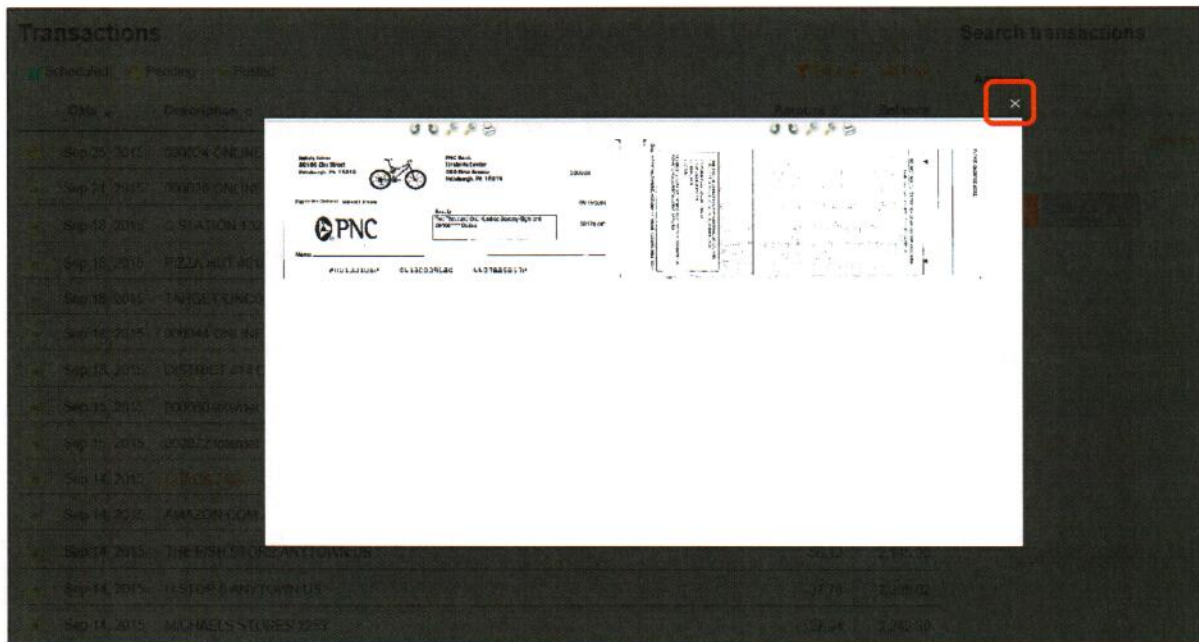
- To view a check image, click the **Check Number** link.

Transactions			
<div> Scheduled Pending Posted </div> <div> Filter Print </div>			
Date	Description	Amount	Balance
Sep 25, 2015	000024 ONLINE TRANSFER TO HERITAGE 3123123123 ON 9/25/15	-1.00	2,444.61
Sep 21, 2015	000026 ONLINE TRANSFER TO HERITAGE 3123123123 ON 9/21/15	-200.00	2,445.61
Sep 18, 2015	C STATION 102 ANYTOWN US	-34.97	2,645.61
Sep 18, 2015	PIZZA HUT #010793 ANYTOWN US	-21.82	2,680.58
Sep 18, 2015	TARGET LINCOLN NE	-12.01	2,702.40
Sep 18, 2015	000044 ONLINE TRANSFER TO HERITAGE 3123123123 ON 9/18/15	-10.00	2,714.41
Sep 18, 2015	DISTRICT #14 DEPT OF EDU PAYROLL 14103110009306	1,500.00	2,724.41
Sep 15, 2015	000060 Internet Payment Out - Loan 9/15/15 2572	-500.00	1,224.41
Sep 15, 2015	000072 Internet Payment Out - Loan 9/15/15 2572	-150.00	1,724.41
Sep 14, 2015	CHECK 2454	-160.00	1,874.41
Sep 14, 2015	AMAZON.COM AMZN.COM/BILLWA	-114.49	2,034.41
Sep 14, 2015	THE FISH STORE ANYTOWN US	-56.12	2,148.90

Once the customer clicks on a check image, an overlay page appears with the front and back of a check image.

Note: If customers are charged for image retrieval, each image view counts as two “clicks” since both the front and back of the image appear.

The customer can use the arrows at the bottom of the overlay screen to view all images on that transaction screen. Or click the X to exit, and return to Internet banking.



Transactions Menu

The Transactions Menu inquiry provides detailed activity such as summary, current business activity, previous business day activity, and a transaction search tool.

Transfers

The Transfers option allows access to account transfer information.

To complete a Transfer:

- Selecting Transfer from the primary navigation menu displays the Transfer page on its own page within the application.

Or

- Selecting Transfer From the accounts list on the home page displays functionality in an overlay window that closes when the transfer is complete.

Welcome **Rutherford Hayes**
Last log in: Apr 14, 2015

Alerts 1 Mail Chat (offline) Profile Log out

MyFinancial, Inc.

Home Accounts **Transfer** Pay bills Budget

Home Accounts

[Edit Accounts](#) [Print](#)

HOUSE ACCOUNT x060	Available balance \$7,522.29	Transfer Recent
Loan Account 2572	Payoff balance \$0.00	Transfer Recent

Pay bills

[Pay Bills](#) [Popmoney](#)

Payments you make in Pay Bills appear on the Payment Center in EPS Bill Payment Interop where you can view, change, or cancel them.

[Payment Detail](#)

- Selecting Transfer from the account detail page displays functionality in an overlay window that closes when the transfer is complete.

MyFinancial, Inc.

Home Accounts **Transfer** Pay

Personal Checking #100 – XXXXXXXXXXXXX3123 ▾

[Details](#) **Transfer** [Documents](#) [Categorize](#) [Download](#) [Stop payments](#)


Account information

Available balance \$2,096.21	Current balance \$2,096.21
--	--------------------------------------

Transfer Page

To complete a One Time Transfer:

1. From the **From account** list, select an account.
2. From the **To account** list, select an account.
3. In the **Date** box, enter the transfer date.
4. In the **Amount** box, enter the transfer amount.
5. In the **Description** box, enter the information. If additional information is needed for future reference.
6. Click **Process transfer**.

 MyFinancial, Inc.

Home Accounts Transfer Pay

Transfer

Create a transfer

Transfers made after 0:00pm Eastern Time will be effective the following business day.

From account * Personal Checking #100 - XXXXXXXXXXXX3123
Available balance: \$2,519.46

To account * HSA - 8050

Date 2015-09-09 ☐ Repeat...

Amount *

Description

* Indicates required field

[Preview transfer](#)

Scheduled transfers


From	To	Date	Frequency	Amount	Description		
Vacation account 7060	HSA 8050	Oct 05, 2015	Monthly 11 Remaining	250.22	Transfer for HSA	Edit	Delete
Vacation account 7060	Personal Checking #100 XXXXXXXXXXXX3123	Sep 07, 2015	One-time	0.00	Daycare	Edit	Delete

7. From the review page, to make changes, click **Edit**, or to complete the transfer request, click **Complete Transfer**.

From account	Personal Checking #100 - XXXXXXXXXXXX3123
To account	CHRISTMAS CLUB - XX0004
Amount	\$10.00
Date	9/9/2015
Description	<input type="text"/>
Complete transfer Edit Cancel	

The Transfer Confirmation page appears.

Note: To request an additional transfer, click **Make another transfer**.

 Your transfer has completed successfully. Your confirmation number is 400000198.

From account	Personal Checking #100 - XXXXXXXXXXXX3123
To account	CHRISTMAS CLUB - XX0004
Amount	\$10.00
Date	9/9/2015
Description	

Make another transfer

Recurring Transfers

1. From the **From account** list, select an account.
2. From the **To account** list, select the an account.
3. In the **Date** box, type the transfer date.
4. Select the **Repeat** box
5. From the **Frequency** list, select the occurrence.
6. From the Repeat the transfer section, select a duration option.
7. In the **Amount** box, enter the transfer amount.
8. If additional informtation is needed for future reference, in the **Discription** box, enter the appropaite information.

Transfer

Create a transfer

Transfers made after 9:00pm Eastern Time will be effective the following business day.

From account *	Personal Checking #100 - XXXXXXXXXXXX3123 Available balance: \$2,519.46
To account *	CHRISTMAS CLUB - XX0004
Date	2015-09-10 <input checked="" type="checkbox"/> Repeat...
Frequency *	Weekly
Repeat the transfer *	<input checked="" type="radio"/> Until I delete it <input type="radio"/> A total of <input type="text"/> times <input type="radio"/> Until <input type="text"/>
Amount *	10.00
Description	<input type="text"/>

* Indicates required field

Preview transfer

9. From the review page, to make changes, click **Edit**, or to complete the transfer request, click **Complete Transfer**.

Transfer

Create a transfer

From account	Personal Checking #100 - XXXXXXXXXXXX3123
To account	CHRISTMAS CLUB - XX0004
Amount	\$10.00
Date	9/10/2015
Frequency	Today and repeating every week for 999 weeks (last transfer on Nov 02, 2034).
Description	

[Complete transfer](#) [Edit](#) [Cancel](#)

The Transfer Confirmation page appears.

Note: To request an additional transfer, click **Make another transfer**.

Transfer

Create a transfer

✔ Your transfer has completed successfully. Your confirmation number is 400000038.

From account	Personal Checking #100 - XXXXXXXXXXXX3123
To account	CHRISTMAS CLUB - XX0004
Amount	\$10.00
Date	9/10/2015
Frequency	Today and repeating every week for 999 weeks (last transfer on Nov 02, 2034).
Description	

[Make another transfer](#)

Scheduled Transfer List

Provides a list of scheduled transfers for the account that allows you to view, change, or delete a scheduled transfer.

1. To modify the transfer information, click **Edit**.

Scheduled transfers							
From	To	Date	Frequency	Amount	Description		
Vacation account 7060	HSA 8050	Oct 05, 2015	Monthly 11 Remaining	250.22	Transfer for HSA	Edit	Delete
Vacation account 7060	Personal Checking #100 XXXXXXXXXXXX3123	Sep 07, 2015	One time	0.00	Daycare	Edit	Delete
Personal Checking #100 XXXXXXXXXXXX3123	HSA 8050	Sep 15, 2015	Weekly	5.00	test 1	Edit	Delete
Personal Checking #100 XXXXXXXXXXXX3123	Vacation account 7060	Sep 10, 2015	One-time	0.00		Edit	Delete
Personal Checking #100 XXXXXXXXXXXX3123	CHRISTMAS CLUB XXXXXX	Sep 17, 2015	Weekly 999 Remaining	10.00		Edit	Delete

Note: A Delete button is available to remove the Scheduled Transfer.

2. Complete the necessary updates, then click **Preview transfer**.
3. From the review page, to make changes, click **Edit**, or to complete the transfer request, click **Complete Transfer**.

Transfers made after 9:00pm Eastern Time will be effective the following business day.

From account *	Vacation account - 7060	
	Available balance: \$6,263.49	
To account *	HSA - 8050	
Date	2015-10-05	<input checked="" type="checkbox"/> Repeat...
Frequency *	Monthly	
Repeat the transfer *	<input type="radio"/> Until I delete it <input checked="" type="radio"/> A total of 11 times <input type="radio"/> Until	
Amount *	250.22	
Description	Transfer for HSA	
* Indicates required field		
Preview transfer		Cancel

Documents

This option allows access to statements and/or notices available in your financial institution's document archive system.

1. From the **Account Navigation** area, click **Documents**.
2. Once the Documents option is selected, select the Account, Document Type and Date Range

Note: Only applicable if utilizing the IMG add-on. After the Accounts, Document Type, and Date Range are selected and the customer clicks Submit, the list of available documents appears. The customer can select which document (statement/notice) in the list to view.

The screenshot displays the 'MyFinancial, Inc.' web application. At the top, there is a navigation bar with links: Home, Accounts, Transfer, Pay, and Budget. Below this, the page title is 'Personal Checking - 7060'. A row of buttons includes 'Details', 'Transfer', 'Documents' (which is highlighted with a red rectangle), 'Categorize', 'Download', and 'Stop payments'. Under the 'Documents' button, there is a 'Document Search' section. This section contains three fields: 'Account' with a dropdown menu showing 'Personal Checking', 'Document Type' with a dropdown menu showing 'Checking Acct St', and 'Date Range' with two date pickers set to '12/19/2012' and '09/14/2015'. A 'Submit' button is located below the date range fields.

After the Accounts, Document Type, and Date Range are selected and the customer clicks Submit, the list of available documents appears. The customer can select which document (statement/notice) in the list to view.

The screenshot displays the Fiserv Document Search interface. At the top, the 'Document Search' section includes fields for 'Account' (DOC DIST TEST CSA), 'Document Type' (CHECKING ARCHIVE STATEMENTS), and 'Date Range' (10/03/2010 to 11/03/2010). A 'Submit' button is located below these fields. Below the search criteria, the 'Available Documents' section lists several documents, all titled 'DDA Account Statements - 11/01/2010 - GEORGE JOHNSON'. The 'Viewing Document' section shows the selected document, 'DDA Account Statements - 11/01/2010 - GEORGE JOHNSON'. The document content includes a header with account details, a 'TRANSCRIPT' section, and a 'Balance of All Transferred' section.

Document Search

Account: DOC DIST TEST CSA

Document Type: CHECKING ARCHIVE STATEMENTS

Date Range: 10/03/2010 To 11/03/2010

Submit

Available Documents

- DDA Account Statements - 11/01/2010 - GEORGE JOHNSON
- DDA Account Statements - 10/29/2010 - GEORGE JOHNSON
- DDA Account Statements - 10/28/2010 - GEORGE JOHNSON
- DDA Account Statements - 10/27/2010 - GEORGE JOHNSON
- DDA Account Statements - 10/26/2010 - GEORGE JOHNSON
- DDA Account Statements - 10/25/2010 - GEORGE JOHNSON
- DDA Account Statements - 10/24/2010 - GEORGE JOHNSON

Viewing Document - DDA Account Statements - 11/01/2010 - GEORGE JOHNSON

1 / 2 49.9% Find

01000001 100000 12/31/2010
ACCOUNT: 0
DOCUMENTS: 0

GEORGE JOHNSON
NORFOLK JOURNAL
JAMES L. JOHNSON
1224 WEST WILKINSON BL
PO BOX 30555
LOS ANGELES CA 90014

TELEPHONE 310-555-9955

***** TRANSCRIPT *****

THIS IS A SUMMARY OF THE BANK'S STATEMENT MESSAGE PRINTS

Thousands of overcharges from
ATM cash to credit
money back

Beginning 1-15-00, Overdraft protection from a savings account or money
checking account will be \$5.00 per item covered. Additionally, checking
accounts with a negative balance for a consecutive calendar day will be
charged \$5.00 per day beginning on the 6th consecutive day since the last
item was presented. Effective 3-1-00, the fee for ATM cash statements
will be \$1.00

YOUR ACCOUNT IS OVERDRAFT

THIS TRANSCRIPT WAS ISSUED FOR YOU TO RECONCILE YOUR ACCOUNT

Balance of All Transferred

Download Transactions

The Download Transaction feature allows the user to download account information in specific formats for use with financial planning software.

Note: For newer formats such as .QFX (Quicken) and .QBO (QuickBooks), a contract must be purchased with Intuit.

1. From the **Account Navigation** area, click **Download**.
2. From the **Date range** list, select the date range.
3. From the **Format** list, select the format style.
4. To download transactions, click **Download transactions**.



The screenshot shows a dialog box titled "Download Transactions" with a close button (X) in the top right corner. The dialog contains the following fields and options:

- Account:** Personal Checking 7000
- Date of last download:** Sep 03, 2015
- Date range *:** A dropdown menu currently showing "Current statement".
- Format *:** A dropdown menu currently showing "Comma separated values (.csv)".
- * Indicates required field**
- At the bottom, there are two buttons: "Download transactions" (highlighted in orange) and "Cancel".

Definitions

Date Range

Current statement
Previous Statement
Since Last Download
All Transaction
Customer date range

Format

Select a format in which the file will be exported.

Values are:

Comma Separated File
Microsoft Money
Intuit® QuickBooks® 2004 and earlier
Intuit Quicken® 2004 and earlier
Intuit QuickBooks 2005 and newer (requires Intuit license)
Intuit Quicken 2005 and newer (requires Intuit license)

Stop Payments

Stop Payments allow a client to request a stop payment on any one of the assigned accounts.

To add a Stop Payment:

1. In the **Check Number** box, type the check number.
2. In the **Payee** box, type the Payee information.
3. In the **Date** box, type item date.
4. Click **Preview stop payment**.

Personal Checking - 7060

[Details](#) [Transfer](#) [Documents](#) [Categorize](#) [Download](#) [Stop payments](#)

Stop payments

Create a stop payment

To add a stop payment, enter the check number of the check to stop if known. If you do not know the check number, select Amount and enter the amount or amount range of the check. Click the "Preview stop payment" button to submit the stop payment for your confirmation. Check number, Amount and Payee are required fields.

The fee for a stop payment is \$30.00 and will be withdrawn from your account at the time the Stop Payment is processed.

Check number *

Payee *

Date

Payee and Date are for informational use and are not used to stop a payment.

Preview stop payment

Issued stop payments

The following stop payments have already been issued:

Payee	Check number	Amount	Date	Expires
Test	1	5.00	Jun 16, 2015	Oct 13, 2015
Test Em	5	5.00	Jun 16, 2015	Oct 16, 2015
test	1234	10.00	Jun 26, 2015	Oct 23, 2015
lost checks	12051215		Jun 26, 2015	Oct 23, 2015

The Stop payments screen appears.

5. Review the information, and then to place the stop payment, click **Create stop payment**, or to modify, click **Edit**.

Personal Checking - 7060

Details Transfer Documents Categorize Download Stop payments

Stop payments

Create a stop payment

To add a stop payment, enter the check number of the check to stop if known. If you do not know the check number, select Amount and enter the amount or amount range of the check. Click the 'Preview stop payment' button to submit the stop payment for your confirmation. Check number, Amount and Payee are required fields.

The fee for a stop payment is \$30.00 and will be withdrawn from your account at the time the Stop Payment is processed.

Account	Personal Checking - 7060
Check number	2001
Payee	test
Date	Sep 14, 2015

Create stop payment Edit Cancel

A stop payment confirmation message appears.

☑ Your stop payment has been issued successfully. Your confirmation number is 400000109.

To add a stop payment, enter the check number of the check to stop if known. If you do not know the check number, select Amount and enter the amount or amount range of the check. Click the 'Preview stop payment' button to submit the stop payment for your confirmation. Check number, Amount and Payee are required fields.

The fee for a stop payment is \$30.00 and will be withdrawn from your account at the time the Stop Payment is processed.

Check number *	
Payee *	Payee and Date are for informational use and are not used to stop a payment.
Date	

Preview stop payment

Issued Stop payments

The Stop Pay List provides complete detail of all Stop Payment items associated with the account.

Issued stop payments				
The following stop payments have already been issued				
Payee	Check number	Amount	Date	Expires
Test	1	5.00	Jun 16, 2015	Oct 13, 2015
Test Em	5	5.00	Jun 18, 2015	Oct 16, 2015
test	1234	10.00	Jun 26, 2015	Oct 23, 2015
lost checks	12051215		Jun 26, 2015	Oct 23, 2015
Washington Orchards	1	25.00	Jan 19, 2012	May 22, 2012
TEST #46	1600	52.00	Jan 10, 2012	May 22, 2012
Country Swim School	2552	395.00	May 29, 2014	Oct 01, 2014
test	2001		Sep 14, 2015	Jan 12, 2016

Profile

The Profile Option allows the customer to change passwords, account nicknames, email address, and security questions.

Note: The information within each section may vary based on the financial institution's branding. All examples shown are from the Fiserv Retail Online Test Bank.

To change the password:

1. Click **Edit**.

MyFinancial, Inc.

Home Accounts Transfer Pay Budget

Welcome **Pat Johnson**
Last log in: Sep 14, 2015

Alerts Mail Chat (offline) **Profile** Log out

Profile

Password	Edit
Challenge questions	Edit
Email	Edit
Phone	View
Address	View
Electronic statements	Edit
Mobile banking	Manage devices

2. In the **Current password** box, type the current password.
3. In the **New password** box, type the new password.
4. In the **Confirm new password** box, retype the new password.
5. Click **Save**.

Profile

Password

Passwords must be 6 - 17 characters and a combination of numbers, letters and special characters containing at least one alpha and one numeric character. Please remember that your password is CaSe Sensitive.

Current password *

New password *

Confirm new password *

* Indicates required field

The Challenge Questions option allows the customer to change their security data established during the initial login. The security challenge questions and answers can also be changed.

6. From the **challenge question** lists, select a challenge question for 1 - 3, and then in the **answer** boxes, type the Answers 1 - 3, as appropriate.
7. Click **Save**.

Challenge questions

You may change all or any part of the data used for authentication in Layered Authentication when logging in to Internet Banking. Select each Challenge Question and provide your answer, up to 83 characters. The Challenge Questions are used to authenticate the user when accessing MyFinancial's online banking from a non-registered computer. All fields are required.

First challenge question *

First answer *

Second challenge question *

Second answer *

Third challenge question *

Third answer *

* Indicates required field

The Change E-mail Address option allows the customer to change the email address listed for the account.

8. In the **New email address** box, type the new email.
9. In the **Confirm email address** box, retype the new Email.
10. Click **Save**.

Email

To change your email address, enter your new email address in the Email address field. Confirm your new email address by entering it again in the Confirm email address field. Email addresses must be in the correct format (John.Smith@example.com).

Email address

pat.johnson@supermail.com

New email address *

Confirm email address *

* Indicates required field

Save

Cancel