# What's New: 4.3 Q2 Upgrade

Outline of changes coming to our online banking

A simple upgrade is occurring to our online banking and mobile app towards the end of June 2019. While most changes are stylistic, we have complied the noticeable alterations in this document for your convenience!

1. Menu

Shrinking the viewing area of the browser will hide the Menu and produce a button at the top right next to our logo. If this button is clicked, the menu will slide out from the left. Simply click a menu option or in the gray area to go back to the screen you were on!
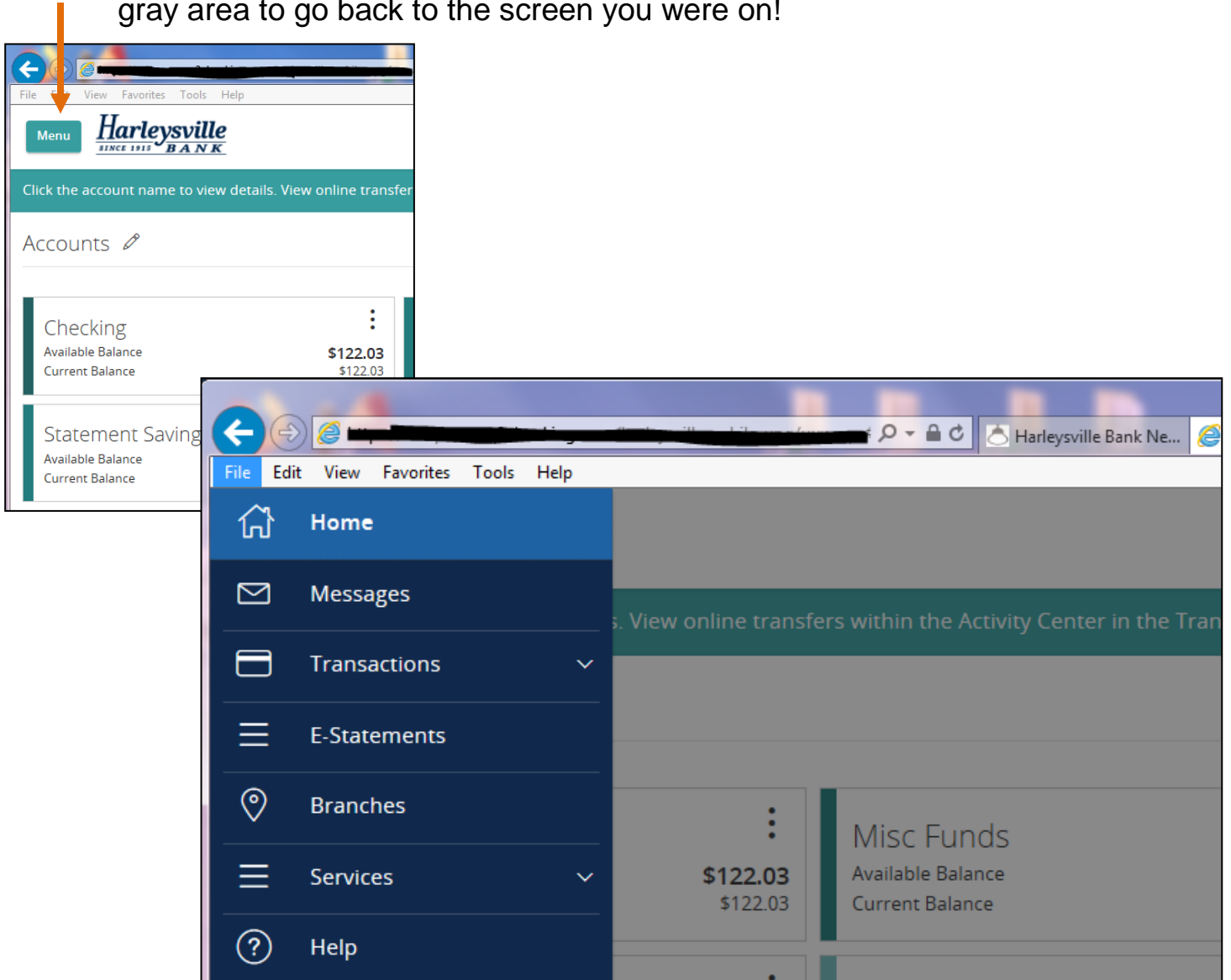
2. Accounts/Home screen
Customers will now be able to edit the header name of the home screen (default overview page/accounts page) by clicking the pencil icon next to the header.
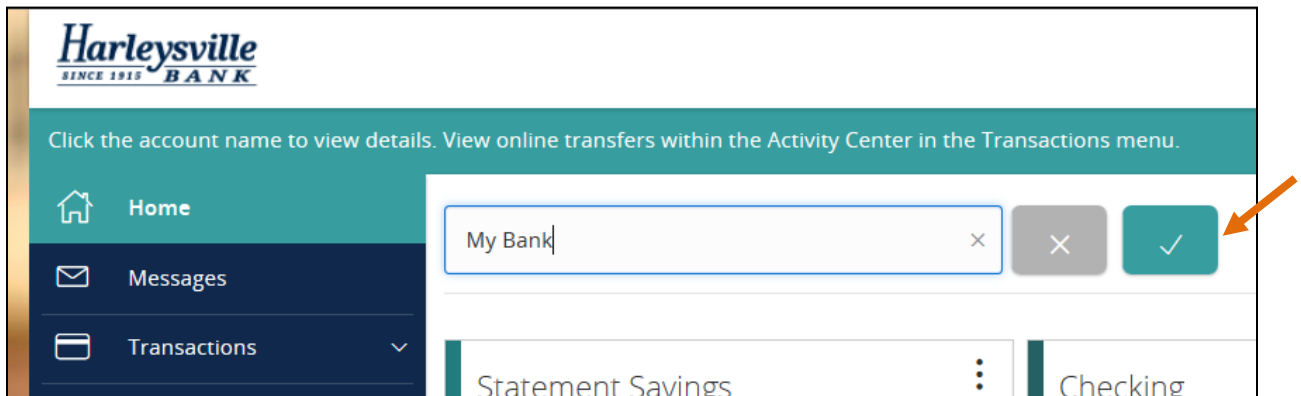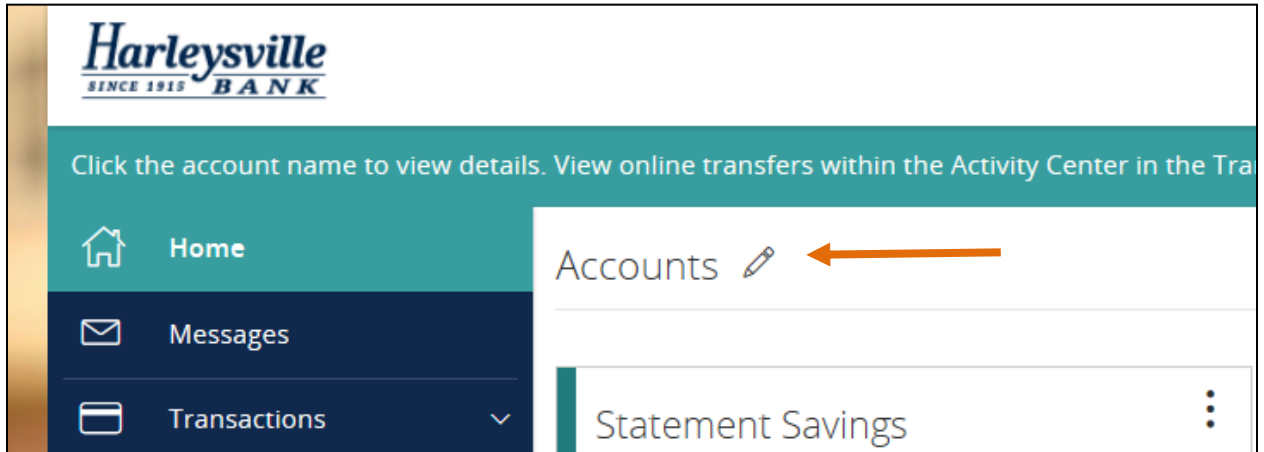

Type in what you want it to say and don't forget to press the checkmark button to submit the change.

3. Account detail boxes

A new quick access feature is available on the Home screen. Customers can click the 3 (THREE) vertical dots within an account's box. This produces a menu with two options:

1. View Activity – will open transactions/account details screen
2. Quick Transfer – will open a pop up to initiate a withdrawal out of the chosen account. You will have the option to pick a "To" account, amount, and date.

   If you want to add a memo or submit a recurring transfer, click "Advanced Options."
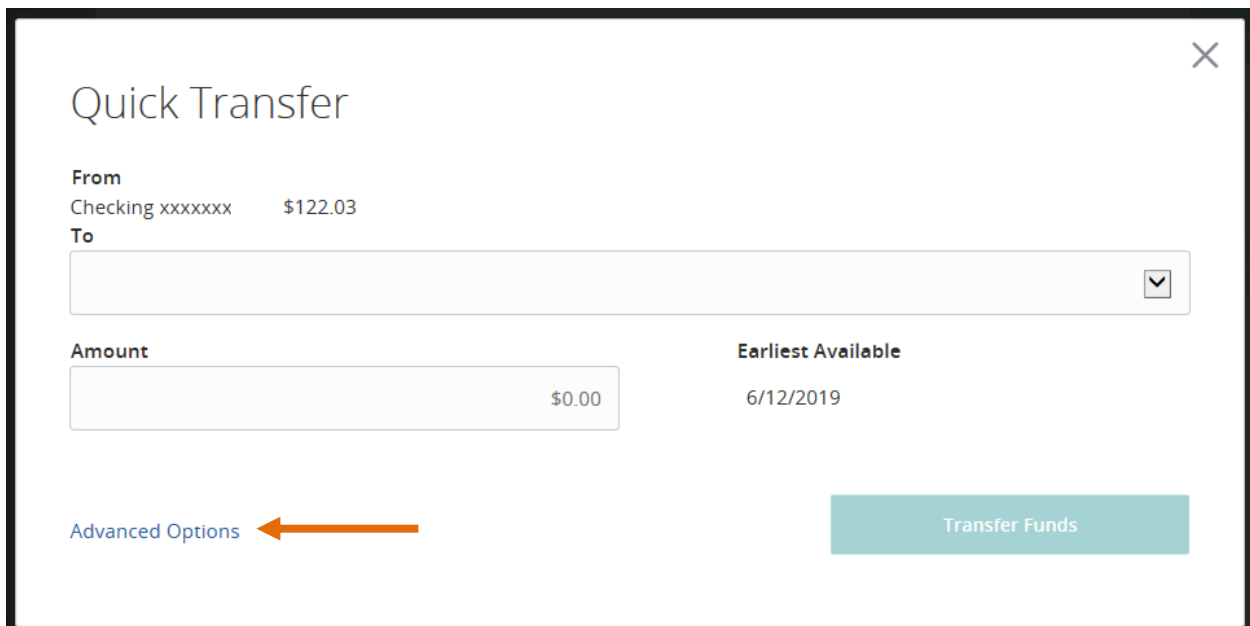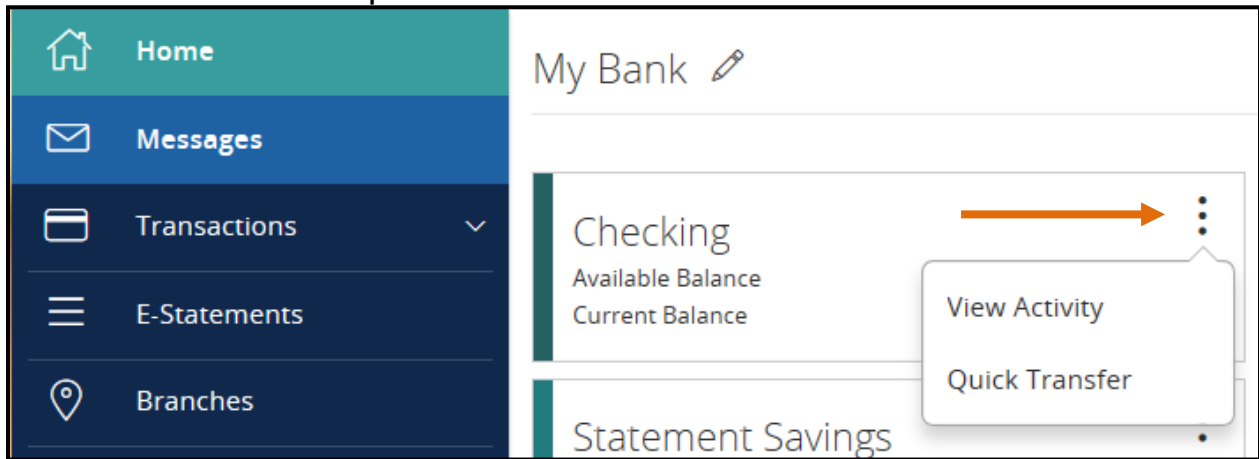
4. Transactions/Account Details screen

Clicking on the account box or "View Activity" option described above will bring the customer to an account details and transaction listing screen. The top will show the nickname of the account, a search bar to Search Transactions and four other selections to choose from.
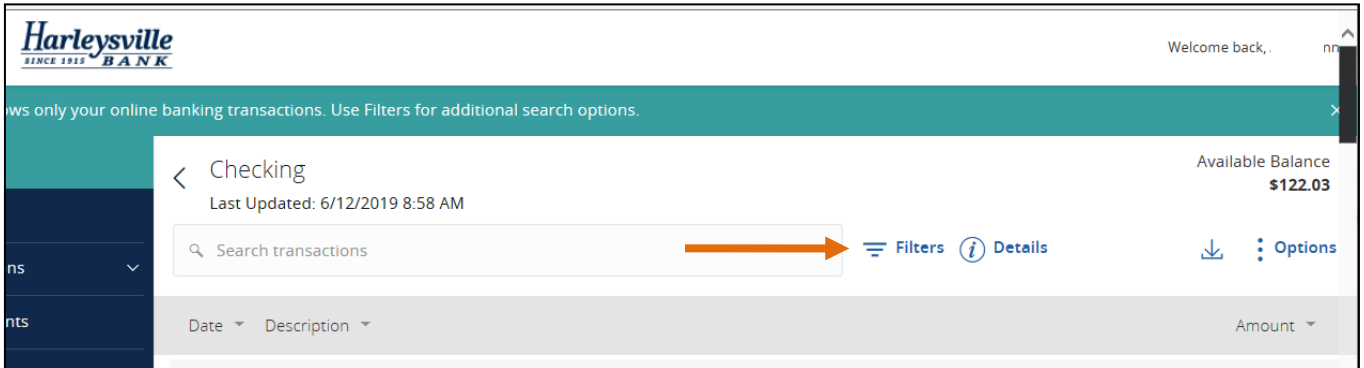

A. ☰ **Filters** Filters: This will open dropdowns and boxes that allow the customer to filter the transactions in the given account. Choose dates, type, any description key words, amounts, or check numbers.
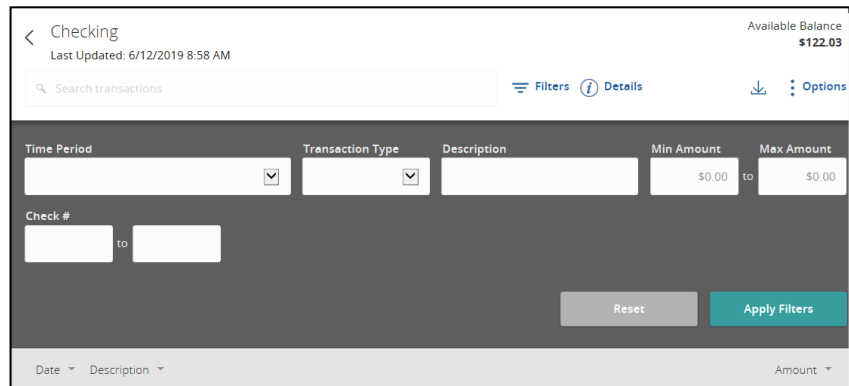

B. (i) **Details** Details: Clicking the inquiry symbol or the word Details will drop down the Account Details section. This is where a customer can see their full account number, the available vs. current balances, the interest rate and APY.

C. ↓ Export: There is no longer the word 'export' in the transaction screen. Click this symbol and a drop down will appear to export the transactions currently showing on that screen to Excel, QuickBooks/Quicken. These export options did not change.

D. ⋮ **Options** Options: Click Options to produce a dropdown with two choices: Print & Ask a Question. Printing will print all the transactions currently showing on the screen. Ask a Question will send an inquiry/message about the account to Deposit Services.

5. Billpay page

The billpay page looks a little different within the new online banking. A customer will immediately be placed on a "Pay Bills" section of this page listing their payees where they can quickly submit a payment. The other section is "Payment Activity" showing the payments already authorized.
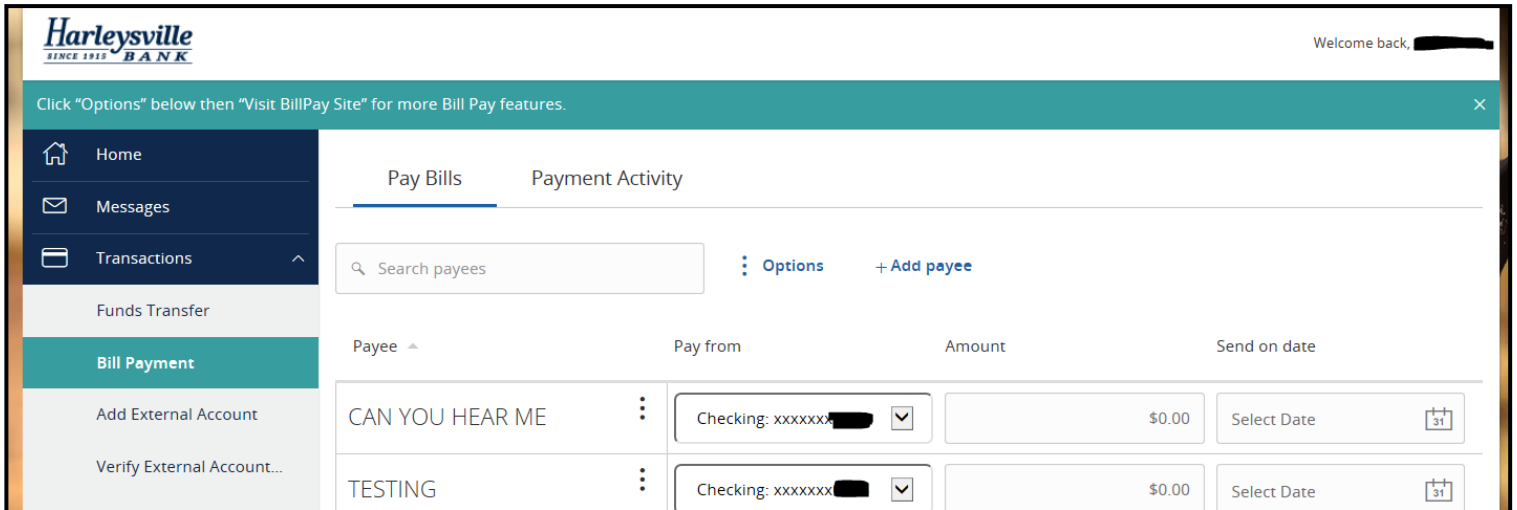
There is no longer an "Advanced" button! Customers should be advised to click "Options" on this page and to choose the first option in the dropdown that appears: "Visit Bill Pay Site"
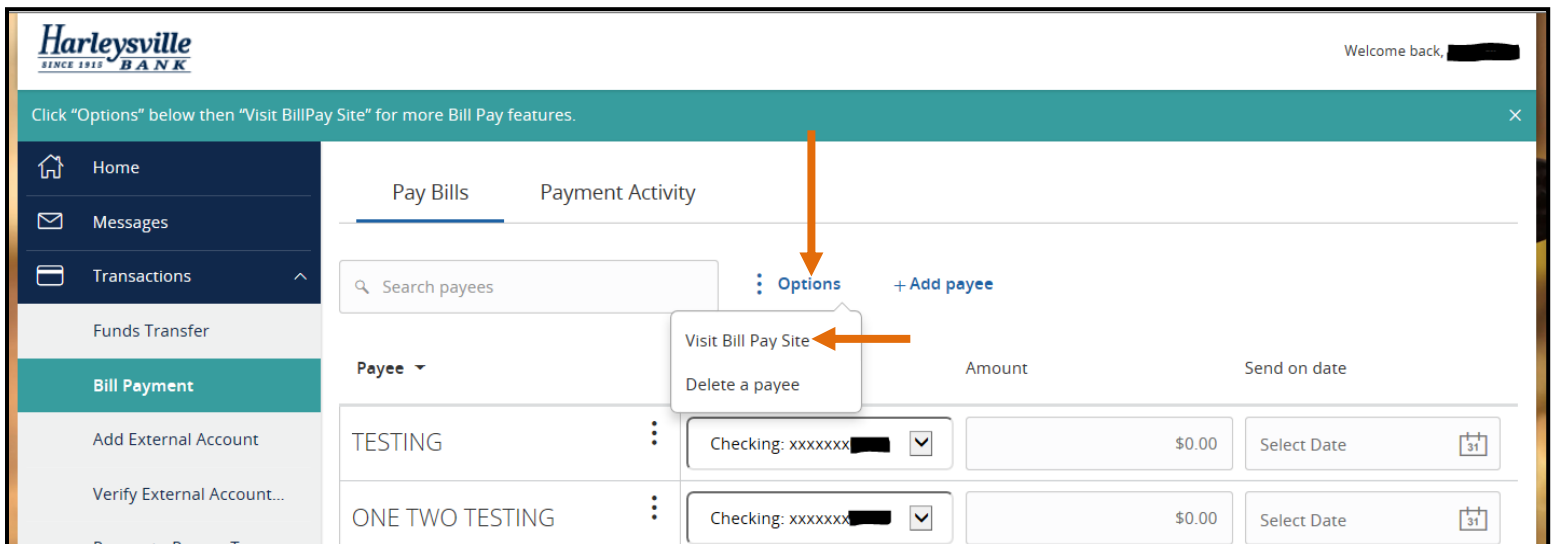
6. Activity Center filter favorites

When visiting the Activity Center (Transactions > Activity Center), all online banking transactions authorized on that profile appear including stop payments, address changes, and transfers between HB and External accounts. You can set up filters to change which transactions you are viewing (and exporting) by determining the type, related account, dates, or amounts.

You can set up specific filters as "favorites" to use in the future without having to set the parameters up again. Once you have the filter inputted, click "Favorites," then "Save as New." A popup will appear so that you can nickname the setup. Use "Favorites" to use or delete previously made setups.

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7. **Account Preferences**

   Visit Preferences > Account Preferences and a customer will see a whole new way to nickname and organize how accounts appear on the online banking home page & funds transfer dropdowns. First, click on the account you wish to edit and more options will appear below.

   A. Change the order in which accounts appear on the home screen and in the funds transfer dropdowns by using the arrows to the right of each account listed on this screen.
   B. Click on the pencil under "Online Display Name" to edit the nickname of the account.
   C. Hide accounts from view using the Visibility slider. These accounts will still be attached to the online banking profile, but won't be seen on the home screen. They will, however, still appear in the funds transfer dropdowns.

Account Preferences

Click anywhere on the account row if you would like to add/edit an account nickname, enable SMS/Text banking or view account details. Group and sort accounts as they are displayed on the homepage.

🔍 Search by account label, name, nickname, number, or product type

Accounts ✏️

A

Checking xxxxxxx_____
Business Analyzed Checking VISIBLE SMS OFF

Accounts ▾

Details   SMS/Text

Online Display Name
Checking ✏️ ← B
Visibility
Visible ⬜ ← C →

Warning

⚠️

By hiding this account, it will no longer display on the overview page. You can continue to view and manage this account in the 'Hidden' group at the bottom of this page, and it will not affect statement delivery or change of address.

No, don't hide   Yes, hide

8. Accessibility Settings
A new page under Preferences is labeled as Accessibility Settings.
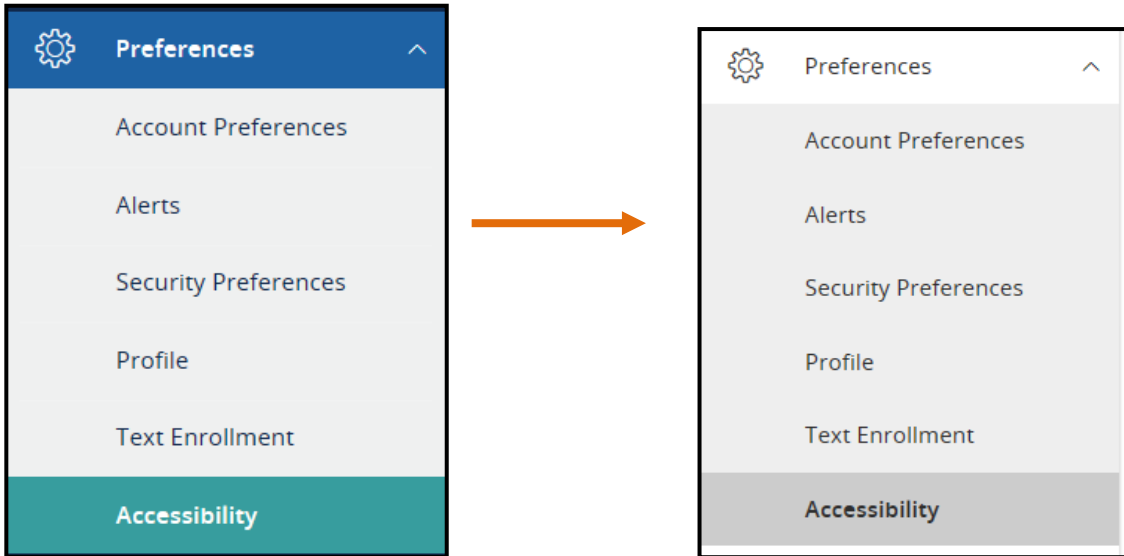
A customer can "enable high contrast mode" to change how our online banking appears. By clicking the box, the colors are grayed (see above).

Accessibility Settings

We are committed to providing online banking that is usable and accessible to everyone. On this page, you will find tools and settings that can enhance your online banking experience.

☑ Enable high contrast mode