



2021 Online Banking Refresh Quick Start Guide

Launching October 24, 2021

www.resource.bank

Customer Service: 985.801.0150

Main Office: 985.801.1888

Refreshed Online Banking Experience

We are excited to announce that on **Sunday, October 24, 2021**, we will be releasing a refreshed Online Banking experience! To help you prepare for these changes, we've put together an overview of the navigational updates and refreshed personalization features.

This refresh will not affect mobile banking, text banking, or Voice-24 telephone banking.

Credit Card, Merchant Services, RPM, and Lockbox portals are not affected.

Your login credentials will not be affected.

You may be asked to agree to updated User Terms and Service Agreements.

NOTE: Colors shown in the images do not represent the colors that will actually be displayed in the Online Banking experience release in October. You will still see our favorite shade of blue.

Table of Contents

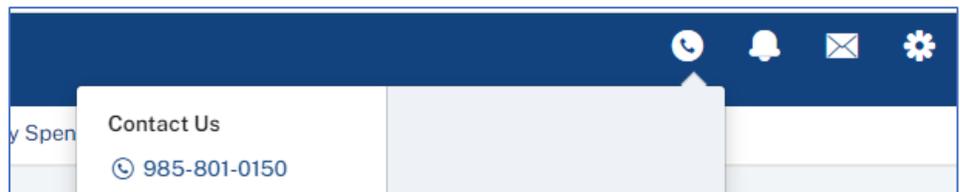
- [Navigational Updates](#)
 - [Overview Page](#)
 - [Accounts Page](#)
 - [Move Money](#)
 - [My Spending](#)
- [Refreshed Features](#)
 - [Widgets and Personalization](#)
 - [QuickView](#)
 - [Favorites](#)
 - [Account Groups](#)

Navigational Updates

Overview Page

- The **Home** page has now been updated to the **Overview** page. Here's a quick summary of the changes you will see:
 - The new Overview page has two (2) columns – **Accounts** and **Widgets**.
 - Your accounts are listed in the left column.
 - The new column on the right side of the page displays widgets available to you.
 - Easily access Resource Bank **contact information** by clicking the phone icon  from 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.

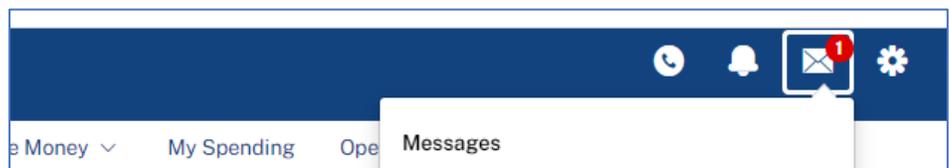
Contact Information



Alerts



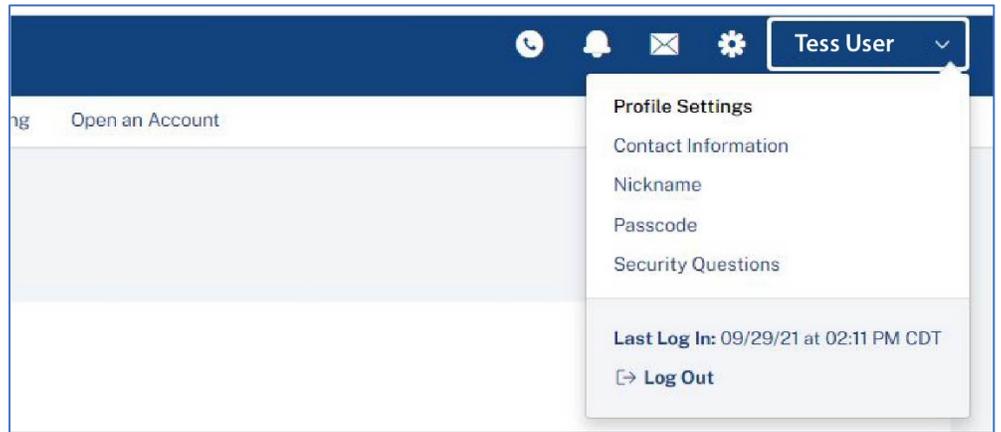
Messages



Services & Settings



Profile Settings & Log Out



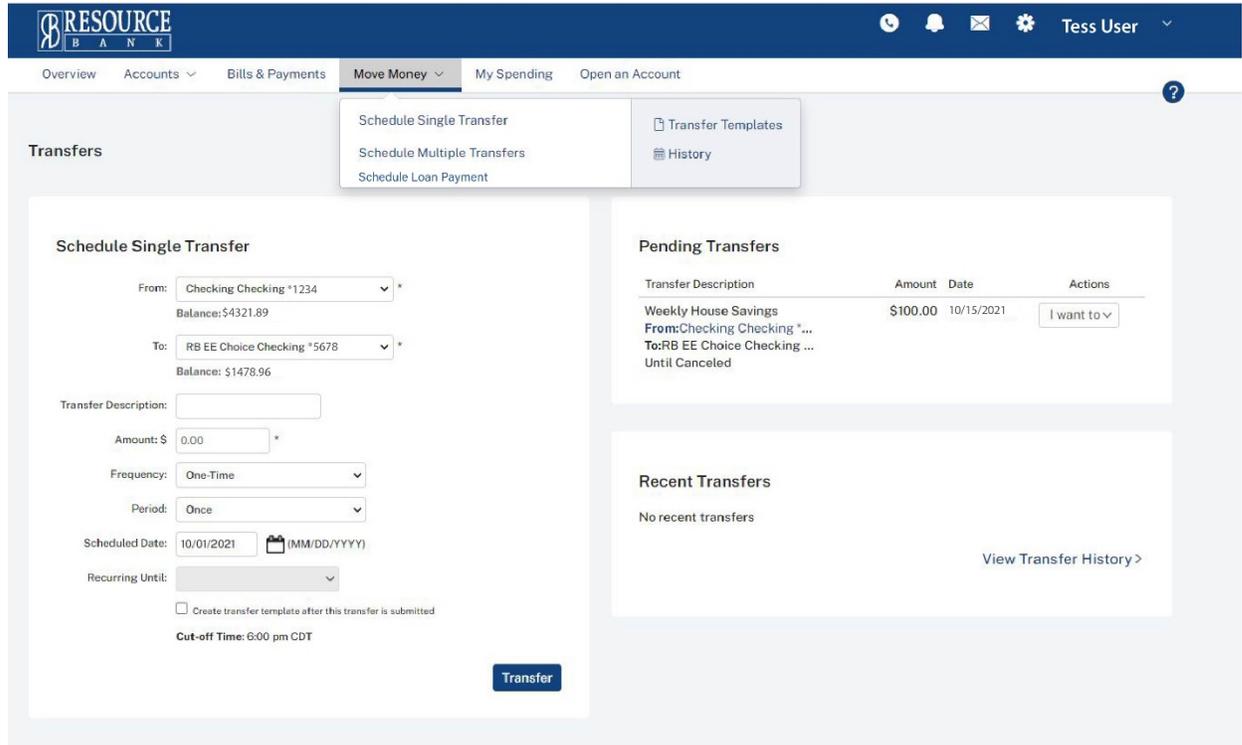
Accounts Page

- 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.

| Date | Description | View All | Category | Credit Debit | Balance |
|------------|---|----------|----------|----------------|-------------|
| 09/30/2021 | Regular Deposit | | Deposit | +100.00 | \$10,125.00 |
| 09/29/2021 | Check # 6027 | | Other | -100.00 | \$10,125.00 |
| 09/29/2021 | ATM Withdrawal took out a whole bunch of cash to party with the gang | | Cash/ATM | -500.00 | \$10,125.00 |
| 09/29/2021 | Regular Deposit | | Deposit | +100.00 | \$10,125.00 |
| 09/28/2021 | Daily Ledger Balance | | | | |

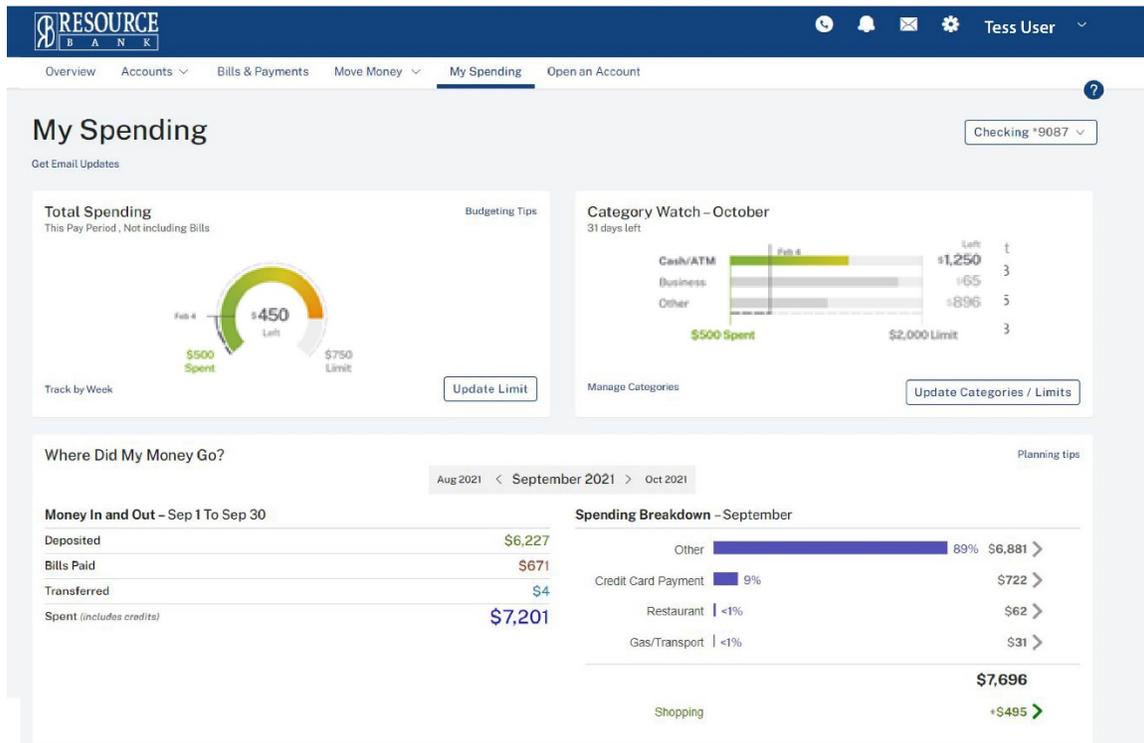
Move Money

- The Move Money page where you conduct transfer contains the same functions and options you use each day.



My Spending

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



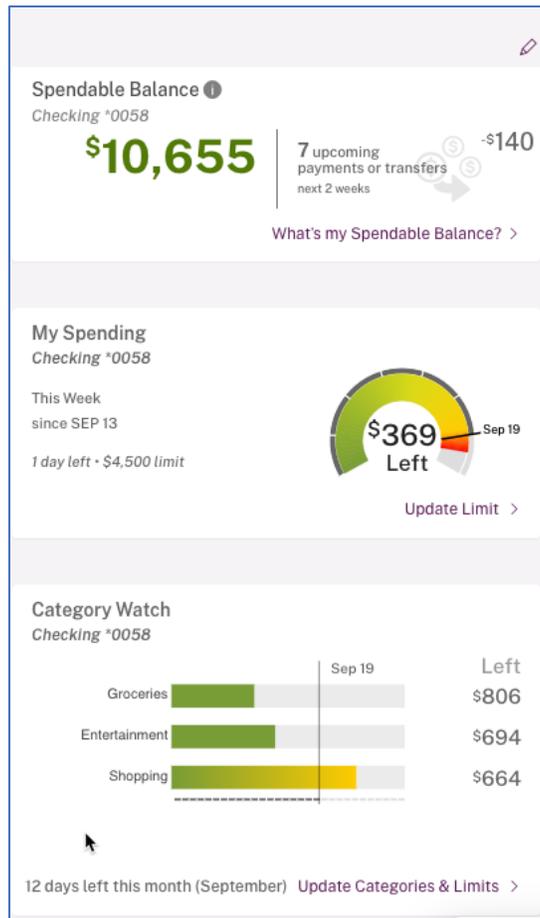
Refreshed Features

Widgets (Overview page)

- Provide direct access to more information and data.
- You can personalize the information and access to the 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 leaving the Overview page.
- Displays the most recent 5 transactions on an account.
- Clicking a transaction displays the transaction modal for quick editing of the transaction on Resource Bank accounts.

Checking *9999

\$24,086.72 Available \$24,483.61 Previous Day

Most recent 5 Transactions from 9/15/2021 to 9/19/2021

| | | |
|-----------|--|---------|
| 9/17/2021 | Unposted: <script>alert('ach template... | -1.00 |
| 9/17/2021 | Regular Deposit | +500.00 |
| 9/17/2021 | Check #6027 | -250.00 |
| 9/17/2021 | ATM Withdrawal | -250.00 |
| 9/17/2021 | Catawba Co County Abc | -25.50 |

Transfer In Transfer Out

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.

All Accounts ★ Favorites

Search by Account Sort By Account Number

Reorder

Favorite Accounts 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 |

Account Groups (Businesses Only)

- End the frustration of searching for specific related accounts in a long list of accounts.
- You can create a subset of accounts that can be used for viewing only those accounts on the Overview page and using those groups for Cash Management features in the future.

