

Home

Sign into your online banking account by clicking “Login” in the top right corner anywhere on our website.

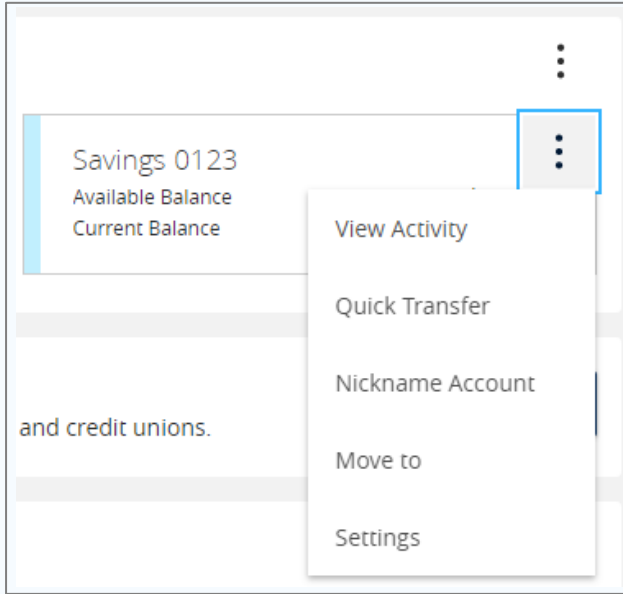
The home page gives you a quick summary of all your accounts with The Business Bank. You can also link external accounts here to view all your financials in one convenient location.

The screenshot displays the home page of the Business Bank online banking interface. It is organized into several sections:

- Financial Tools:** Located at the top, it includes a gear icon, the text "Financial Tools", a sub-header "Take the work out of staying on top of your finances.", and a "Get Started" button.
- ACCOUNTS:** This section features a title "ACCOUNTS" and a vertical ellipsis menu icon. It contains two account cards:
 - Basic Checking 0124:** Shows an Available Balance of **\$76.99** and a Current Balance of **\$76.99**. It has a vertical ellipsis menu icon.
 - Savings 0123:** Shows an Available Balance of **\$1,091.76** and a Current Balance of **\$1,091.76**. It has a vertical ellipsis menu icon.
- Link Account:** Includes a link icon, the text "Link Account", a sub-header "View your balance and history from other banks and credit unions.", and a "Get Started" button.
- ASSET SUMMARY:** Features a title "ASSET SUMMARY" and an upward-pointing chevron icon. It contains:
 - A donut chart showing **\$1,169 Total Assets** with **93%** highlighted in blue.
 - A section for **Savings 100000123** with a **93.41%** percentage, showing an Available Balance and Current Balance of **\$1,091.76**, and a "View Transactions" link.

Selecting the ellipses button next to an account provides additional options specific to that account.

The Business Bank - Navigating Online Banking



- **View Activity:** Recent transactions and events for the account.
- **Quick Transfer:** Quickly move money between your accounts at The Business Bank.
- **Nickname Account:** Change the displayed name of the account.
- **Move to:** Create and group your accounts to stay organized.
- **Settings:** View all information about the account including full account number, statement dates, interest rates, etc.

Selecting “View Activity” on an account will display the screen shown below, which provides details and transactions specific to that account.

← Back

BB Basic Checking 0123
Last Updated: January 4, 2024 9:38 AM

\$643.71 Current Balance | \$643.71 Available Balance

Transactions Details & Settings

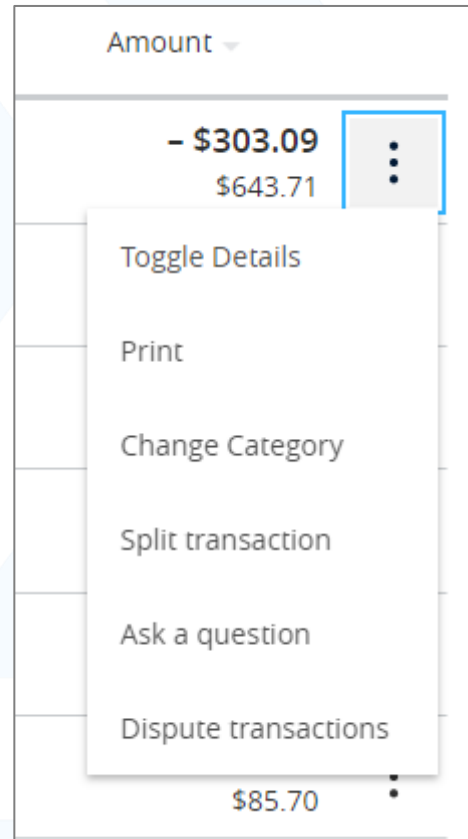
Search transactions

Date	Description	Amount
JAN 2 2024	Best Buy Electronics & Software	- \$303.09 \$643.71
DEC 31 2023	Rate Change Interest Income	
DEC 31 2023	Interest Interest Income	
DEC 29 2023	Price Chopper Groceries	
DEC 29 2023	ATM Withdrawal Cash	
DEC 29 2023	ATM Service Reversal Uncategorized	\$85.70

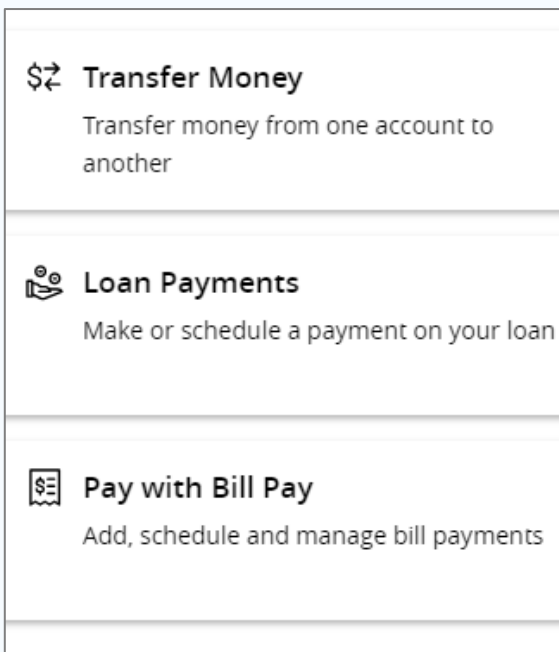
- Toggle Details
- Print
- Change Category
- Split transaction
- Ask a question
- Dispute transactions

From here, you can tap the ellipses button on any transaction or activity listed and select from a list of actions.

- **Toggle Details:** View full description of transaction.
- **Change Category:** Choose from existing or create your own categories to organize purchases.
- **Split transaction:** Visually break up the transaction into two custom amounts.
- **Ask a Question:** Dispute a transaction or request assistance from the bank on a transaction.
- **Dispute transactions:** Send transaction to our customer support team to review and dispute the transaction.



Transfers & Payments



From the left navigation bar, click on “Transfers & Payments” to view begin either a transfer or loan payment.

You can also quickly access this using the navigation bar on the right.

Completed and submitted transfers can be viewed in the “Online Activity” tab, covered in the next section.

Note: transfers submitted after 7:00 PM Eastern will be processed the next business day.

Online Activity

From the home page, click “Online Activity” on the navigation bar on the right side of your screen.

Single Transactions		Recurring Transactions		Deposited Checks	
Created date	Status	Transaction Type	Account	Amount	
6/28/2023 12:25 PM	Processed	Funds Transfer Tracking ID: 14622	Basic Checking 10003077	\$15.00	<input type="checkbox"/> ⋮
5/18/2023 1:31 PM	Processed	Funds Transfer Tracking ID: 13003	Basic Checking 10003077	\$50.00	<input type="checkbox"/> ⋮
5/17/2023 1:28 PM	Processed	Funds Transfer Tracking ID: 12980	Basic Checking 10003077	\$5.00	<input type="checkbox"/> ⋮

The online activity tab displays all activity performed via online or mobile banking. This includes fund transfers, recurring transactions, and deposited checks.

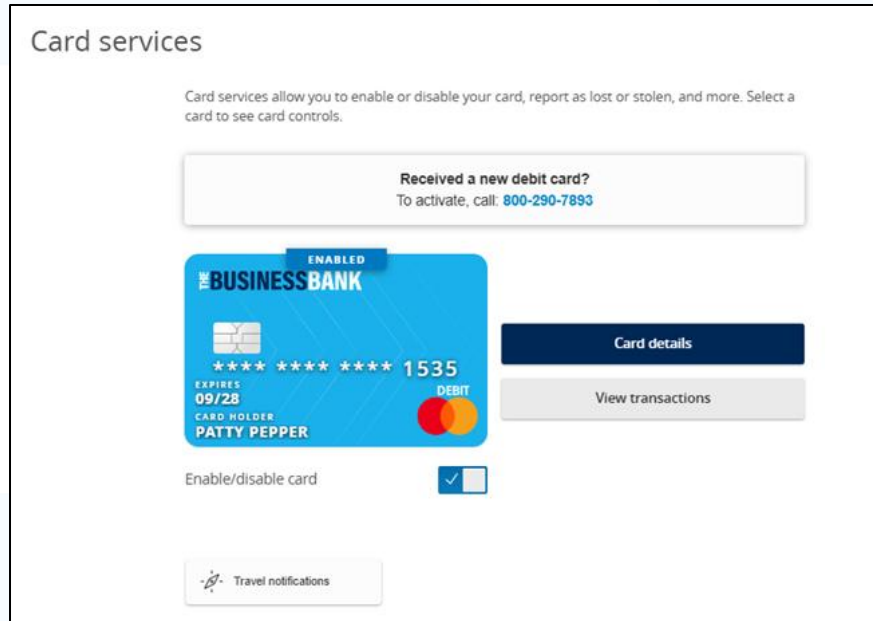
You can click the ellipses to view a breakdown of the specific transaction, inquire with the bank, or copy the details.

By pressing the funnel button at the top, you can filter your transaction list to only see ones that meet your set criteria.

Card Management

Using the left navigation bar, selecting “Card Management” allows you to control your debit card right from Online Banking.

The Business Bank - Navigating Online Banking



- Enable or disable your card immediately with a toggle.
- Setup limits for your card such as:
 - Amount per transaction or per month.
 - Automatically decline eCommerce, mail/phone order, recurring, or ATM transactions.
- View a list of all transactions that originated from the specific card.
- Report card lost or stolen.
- Manage your travel notifications to protect yourself from fraud by letting us know where you'll be traveling.
- Request a new card PIN be mailed to your address.