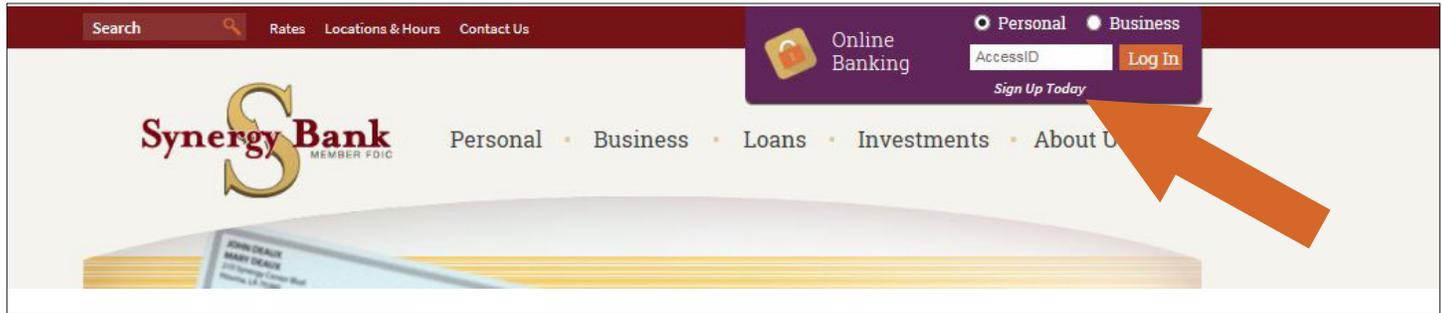


# ONLINE BANKING

## ENROLLMENT / RE-ENROLLMENT

To get started, visit [www.banksynergy.com](http://www.banksynergy.com). At the top of the page, locate the purple Online Banking log-in bar. Whether enrolling or re-enrolling, click **Sign Up Today**.



If it doesn't take you to this form directly, click **First Time User** at the top of the screen.



Enter your information into the fields. This will verify your information to allow you into Online Banking.

A screenshot of the 'First Time User Authentication' form. The form is titled 'First Time User Authentication' and contains several input fields: \* EMAIL ADDRESS, \* VERIFICATION EMAIL ADDRESS, \* ACCOUNT NUMBER, \* ACCOUNT TYPE (with a dropdown menu showing 'Checking'), \* SECURITY QUESTION...i.e. (1st pet's name, mother's maiden name, etc.), \* SECURITY ANSWER, and \* PASSWORD. Below the password field, there is a note: 'If you have accessed TeleBanc, use your TeleBanc pin as your initial password. If not, use the last 4 digits of your SSN for the initial password.' There is also a link to 'Click Here to Review the Terms and Conditions' and a 'Submit' button. Three orange arrows point to the form fields with the following instructions: 'Re-enter your email address' (pointing to the first email field), 'Enter only one of your account numbers' (pointing to the account number field), and 'Last 4 digits of your social security number' (pointing to the password field).

The following screen will ask you to create an **Access ID**. If you are re-enrolling, you may use your same Access ID and Password as your previous Online Banking account, if you wish.

## LOG IN TO ONLINE BANKING

Once you have enrolled, you now have access to your Online Banking. To sign onto your account, you will need to click the **Login Type** drop down box in the Online Banking Log In on Synergy Bank's website and choose if you are logging

# ONLINE BANKING

You are now securely logged into your Online Banking account. The homepage of your Online Banking will have an Overview of your accounts and some easy access functions.

Help Options Log Off

**Synergy Bank** MEMBER FDIC **My Account(S)** • **Bill Pay**

Welcome Hugh Grant. You have [01](#) unread and [01](#) read messages. Your last login was February 20, 2014 02:50:00 PM

**My Account(s)**

Account	Description	Available	Current
1	CAREFREE CHECKING		.00
1	Personal Savings		.00

**Recent Transactions** February 20, 2014

Account: CAREFREE CHECKING 1 \$ .00

Description	Amount	Balance
[0038] No History is available.		

**Transaction Search**

Search Criteria

Account: CAREFREE CHECKING 1 \$ .00

Search: Date

From: [ ] [ ]

Thru: [ ] [ ]

Display

**Spending Report**

CAREFREE CHECKING 1 \$ .00

From: 01/27/2014 To: 02/03/2014

Chart My Spending

No Transactions Found for Specified Date Range. Please select a different date range or a different account.

If you have any unread **messages**, a notice will be here. You can read the messages by clicking on the number of messages listed.

**Synergy Bank** MEMBER FDIC **My Account(S)** • **Bill Pay**

Welcome Hugh Grant. You have [01](#) unread and [01](#) read messages. Your last login was February 20, 2014 02:50:00 PM

**My Account(s)**

All of your accounts and current balances will be listed under **My Accounts**. Click anywhere in this box to be taken to your full Accounts menu. You can also access the Accounts menu by clicking **My Account(s)** tab.

**My Account(s)**

▼ Deposits (2) .00

Account	Description	Available	Current
1	CAREFREE CHECKING		.00
1	Personal Savings		.00



Under the **Recent Transactions** category, you will see all of your recent account history for the account selected. To view recent transactions for another account, click the drop down button and select the account you wish to view. The next category is **Transaction Search**, where you can quickly check number.

**Recent Transactions** February 20, 2014

Account: CAREFREE CHECKING 1 \$ .00

Description	Amount	Balance
[0038] No History is available.		

Transaction Search

**Transaction Search**

Search Criteria

Account: CAREFREE CHECKING 1 \$ .00

Search: Date

From: [ ] [ ]

Thru: [ ] [ ]

Display

- ← Choose account you want to search within
- ← Choose search criteria from box
- ← Enter date range to search within

In your **Spending Report**, you will see a snapshot report based on your income and expenses. Categories include groceries, automotive, and entertainment. You will learn how to change the category of a transaction later in this tutorial.

**Spending Report**

CAREFREE CHECKING 1 \$ .00

From: 01/27/2014 To: 02/03/2014

Chart My Spending

No Transactions Found for Specified Date Range. Please select a different date range or a different account.

# ONLINE BANKING

## Options

The **Options** button is located in the red banner at the top left of the page.



**Options**

**Change Password**

\* Current Password:

\* New Password:

\* Confirm New Password:

\* Indicates Required Field

Your Access ID must be at least 8 characters. Passwords must be 6-16 characters & a combination of numbers and letters, containing at least one numeric character and one alpha character. Please remember that your Access ID and Password are CaSe SensiTive.

**E-Mail**

E-Mail:

**Security Data**

Challenge Question 1 :  Answer:

Challenge Question 2 :  Answer:

Challenge Question 3 :  Answer:

**Change Security Question and Answer**

\* Question:

\* Answer:

\* Indicates Required Field

**Mobile Banking Profile**

Enrollment Status: Not Enrolled

**Account Nicknames**

Select	Account	Nickname
<input type="checkbox"/>	1 CAREFREE CHECKING	
<input type="checkbox"/>	1 Personal Savings	

**eStatement Enrollment**

Primary Accounts		
Account	Enrollment Status	Primary Account Owner Email
***12 CAREFREE CHECKING	Not Enrolled	
***34 PERSONAL SAVINGS	Not Enrolled	

Secondary Accounts		
Account	Enrollment Status	Primary Account Owner Email

Change your password to Online Banking

Change your email where you receive eStatements and Online Banking alerts

Change authentication questions that are asked at log in

Change your Security Question and Answer

Click here to accept the terms for Mobile Banking. Once you do this, you can download the Mobile App from the App Store. See the Mobile App Tutorial for more info.

Here you can assign and/or change the nicknames of your accounts.

Here you can see which of your accounts are enrolled in eStatements. Click "edit" to enroll one or more of your accounts in eStatements.