

How to Customize Account Names in Online & Mobile Banking

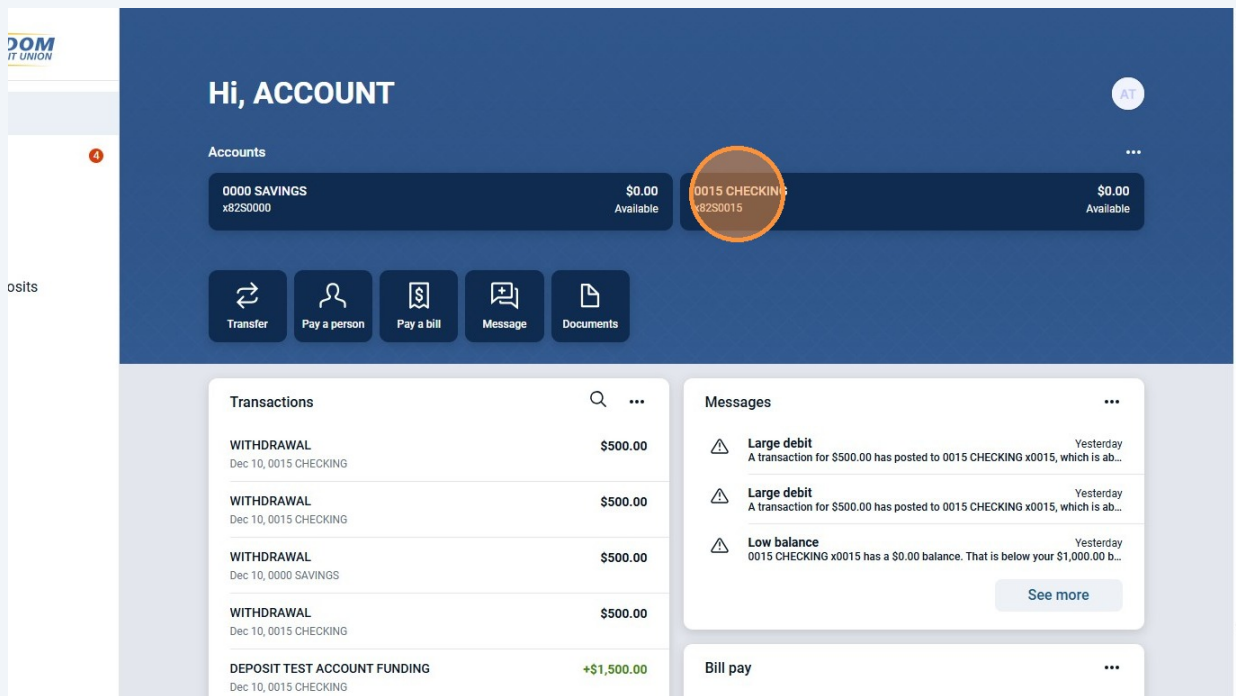


This tutorial will guide you through changing how a share account is displayed in Online and Mobile Banking.

1

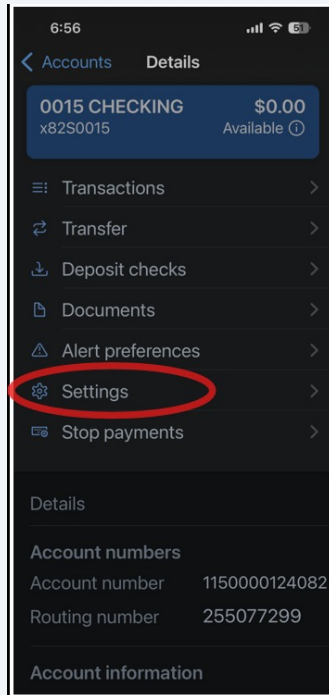
2

To change the displayed name of your share accounts in Online or Mobile Banking, log in, select the share account you want to nickname, and locate the 'Settings' option.



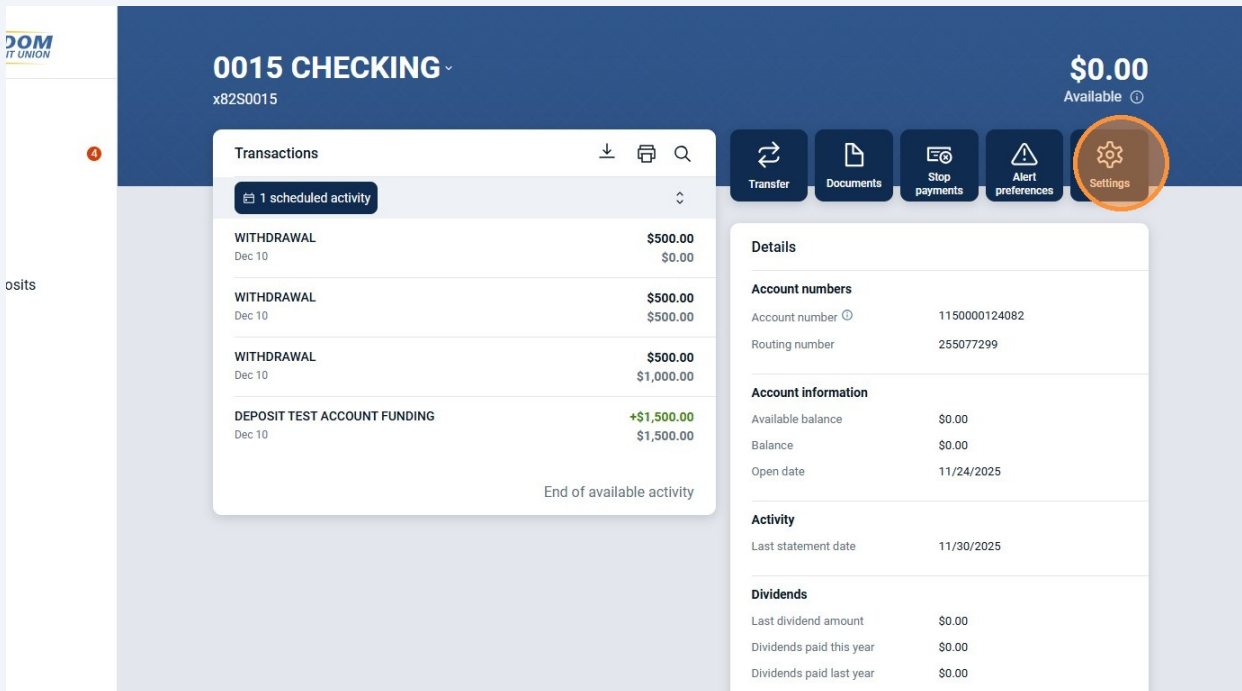
3

In the Mobile app, the 'Settings' feature is located in the menu under the selected share account.

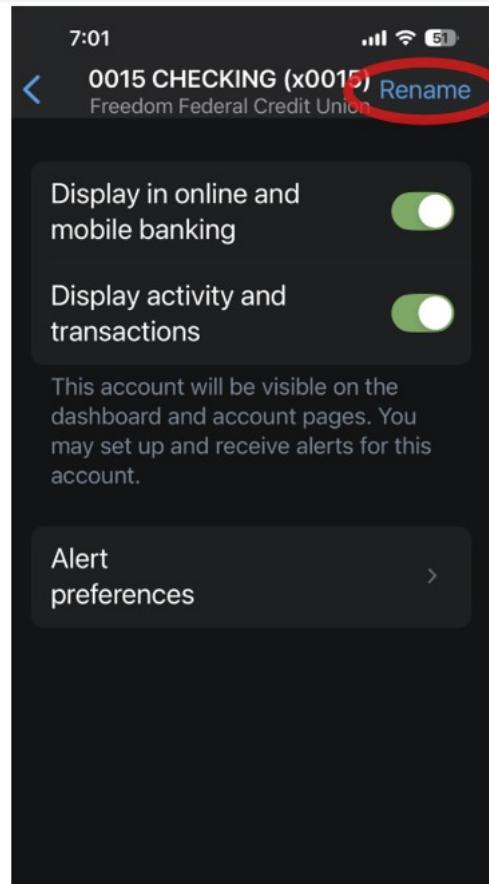
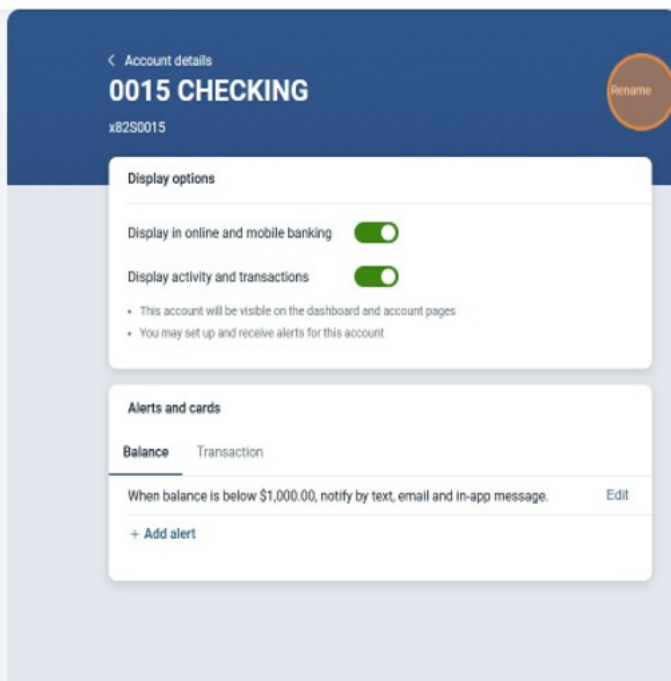


4

In Online Banking, the 'Settings' option is located to the right of the share account.



5 Select 'Rename'.

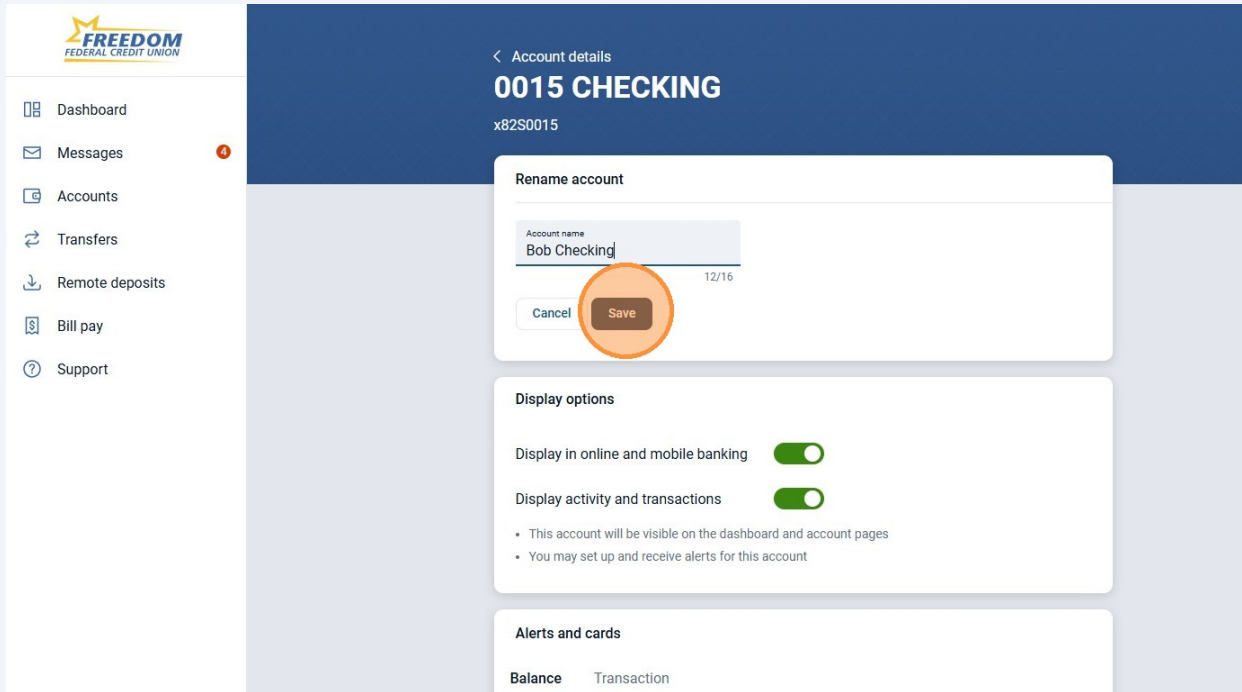


6

Enter the name you would like to use for the share account. *Note: Account names' are limited to 16 characters.*

The screenshot shows a mobile banking interface. At the top, there is a blue header with a back arrow and the text 'Account details'. Below this, the account name '0015 CHECKING' is displayed in large white font, with the account number 'x82S0015' in smaller white font below it. A white dialog box titled 'Rename account' is overlaid on the screen. It contains a text input field with the placeholder 'Account name' and a character count '0/16' to its right. An orange circle highlights the input field. Below the input field are two buttons: 'Cancel' and 'Save'. Below the dialog box, there is a section titled 'Display options' with two toggle switches, both of which are turned on. The first toggle is labeled 'Display in online and mobile banking' and the second is labeled 'Display activity and transactions'. Below these toggles is a bulleted list: '• This account will be visible on the dashboard and account pages' and '• You may set up and receive alerts for this account'. At the bottom of the screen, there is a section titled 'Alerts and cards' with two sub-sections: 'Balance' and 'Transaction'.

7 Select 'Save' when finished.



8 The nickname will now appear in Online and Mobile Banking, making it easier to distinguish between multiple checking and savings accounts.

Please note: nicknames created here are for display purposes in Online and Mobile Banking only. If you would like your share account to be permanently renamed and reflected with a custom name on your statements, please contact us—we're happy to assist!

