

## Quick Overview Guide

### Available balance

1. The easiest way to view your available balance is from the Account Summary (Home) screen.
2. Once successfully logged in, the Home screen is the first screen that loads.

### Transaction History

1. Transaction history can be viewed by selecting the account from the account list on the Home screen or selecting the Accounts tab from the top navigation menu.
2. Once the desired account is selected, the Account History page will load.
3. On the Account History page, the transaction history will display in the Transaction section. To search for a transaction use the Search Transactions menu on the right; or filter the transaction list by sorting the columns by date, description, debit or credit.
4. To view the details for a different account, select the arrow beside the account name at the top of the page and use the drop down list to change the account selection.

### Download transaction history

1. From the Home or Accounts page, select the applicable account. Once the Account History page loads, select download transactions.
2. Specify the transactions, activity, and file format you would like to download on the next window.
3. Select Download Transactions or Cancel to return.

### View e-statements

1. From the Home or Accounts page, select the applicable account.
2. Once the Account History page loads, select the Statements & Documents button.
3. Choose the account, document type, input a date range (if necessary), and click submit.
4. View statements for other accounts by clicking on the Account drop down and making the applicable selection.

### Funds Transfer

1. For easy access to funds transfers, select Internal on the Payments & Transfers quick navigation menu to transfer funds between accounts. Use the drop down menu to choose which accounts to transfer the money from, the date, and the amount. Select repeat if the transfer should recur in the future.
2. Select Preview Transfer.
3. Review and select Complete Transfer to process the request. The options to edit or cancel are also available.

### Place a Stop Payment

1. From the Home or Accounts page, select the account that needs a payment stopped. The Account History page will load.
2. Select the Add Stop Payment button and complete required fields.
3. Review and select Complete Transfer to process the request. The options to edit or cancel are also available.

### General information on an account (i.e. interest rate, payment information)

1. From the Home or Accounts page, select the account you wish to view account details for. The Account History page will load.
2. All of the general information for the account will display on the Account History page. To view the details for a different account; select the arrow beside the account name at the top of the page and use the drop down list to change the account selection.

### Change Password

1. Select Profile located at the top of any page within Business Online Banking.
2. Click edit next to Password. Update your Password.
3. Click save or cancel.

### Change Security Questions

1. Select Profile located at the top of any page within Business Online Banking.
2. Click edit next to Challenge Questions. Update your Challenge Questions and Answers.
3. Click save or cancel.

### Helpful Phone Numbers

- **Business Online Banking Questions:**  
[888.343.4988](tel:888.343.4988) - Option 4, then Option 1  
Monday – Friday 8am – 6pm EST
- **Bill Pay Questions:**  
[855.772.6050](tel:855.772.6050)  
Hours of Operation: 7am - 1am EST  
7 days a week

### Branch Contact Information:

- Orlando - [407.637.3740](tel:407.637.3740)  
**Maryann Baner**  
Manager of Retail Banking  
NMLS#1058427  
386.717.0335
- Gainesville - [352.692.5280](tel:352.692.5280)  
**Wendy Robertson**  
Business Relationship Banker  
NMLS# 1720611  
352.870.4951
- Jacksonville - [904.407.4740](tel:904.407.4740)  
**Jessica Steinbeck**  
Business Relationship Banker  
NMLS# 1168742  
904.501.5280
- Tampa - [813.223.9040](tel:813.223.9040)  
**Barbie Blank**  
Business Relationship Banker  
NMLS # 1130317  
813.422.9227