



Digital Banking Quick Help Guide

Homepage Overview

The new Online Banking Homepage has some new and some familiar features.

The screenshot shows the OHecu digital banking homepage. At the top is a dark blue navigation bar with links for 'Additional Services', 'Secure Forms', and 'TurboTax'. Below this is a 'Greetings Widget' that says 'Hello, Sam'. To the right of the greeting is a 'Customize Home Screen' button. The main content area is divided into several sections. On the left is a 'Message Widget' titled 'Messages for you' with three messages: 'High-Yield Certificates of Deposit', 'Welcome to digital banking!', and 'Celebrate the holidays with \$100 referrals.' Each message has a 'Learn More' link. Below the messages is an 'Internal Accounts' section showing a summary of 'Total Loan Accounts', 'Total Investment Accounts', and 'Total Deposit Accounts' with their respective balances. To the right of the messages is a 'Quick Actions' section with four tiles: 'Manage Cards', 'Make a Transfer', 'Make A Payment', and a 'Customize Home Screen' button. Below the 'Internal Accounts' section is a 'Widget Stack' containing four account widgets: 'ABS Account', 'Business OFX Checking', 'OFX Business Checking', and 'Simulator Checking'. Each widget shows the account name, a masked account number, the available credit, and buttons for 'Show more', 'Apply for a Loan', and 'Make a Transfer'. On the far right is a sidebar with a list of links: 'Budgets', 'Insights', 'Spending', 'Turbo Tax', 'Template Widget', and 'CCPA Privacy'.

Customize Home Screen

Additional Services Secure Forms TurboTax

Hello, Sam

Customize Home Screen

Messages for you

High-Yield Certificates of Deposit Welcome to digital banking! Celebrate the holidays with \$100 referrals.

Learn More Need Help? Learn More

Internal Accounts

Total Loan Accounts \$5,800.78

Total Investment Accounts \$4,836.47

Total Deposit Accounts \$844.75

ABS Account *****026 Available Credit \$12,293.28 Show more Apply for a Loan Make a Transfer

Business OFX Checking *****101 Available Credit \$5,202.62 Show more

OFX Business Checking *****111 Available Credit \$2,000.03 Show more Apply for a Loan

Simulator Checking *****001 Available Credit \$7,477.6 Show more Apply for a Loan Make a Transfer

Quick Actions

Manage Cards Make a Transfer Make A Payment

Widget Stack

Budgets Insights Spending Turbo Tax Template Widget CCPA Privacy



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Customizable Homepage: Online

Customize the homepage to change your name used in the Greeting Widget and to “favorite,” hide, or rearrange widgets in the Widget Stack.

The screenshot shows the OHecu digital banking homepage. At the top is a navigation bar with links: My Accounts, Move Money, Manage Money, Additional Services, Secure Forms, and TurboTax. Below the navigation bar, the homepage is divided into several sections. On the left, there's a 'Hello, Sam' greeting. Below that, a 'Messages for you' section contains three cards: 'High-Yield Certificates of Deposit', 'Welcome to digital banking!', and 'Celebrate the holidays with \$100 referrals.' Each card has a 'Learn More' link. To the right of the messages, there are three widget slots: 'Manage Cards', 'Make a Transfer', and 'Make A Payment'. Below these, there's a 'Budgets' widget. On the far left, there's an 'Internal Accounts' section showing a total balance of \$30,482.00, with sub-sections for 'Total Loan Accounts' (\$5,800.78), 'Total Investment Accounts' (\$4,836.47), and 'Total Deposit Accounts' (\$844.75). Below this, there are two account cards: 'ABS Account' (****026) and 'Business OFX Checking' (****101), each with a heart icon for favoriting. A red box highlights the 'Customize Home Screen' button in the top right corner. A red callout points to the 'Greeting Name' field in the 'Home Screen Settings' dialog, which currently shows 'Name Sam'. Another red callout points to the 'Widget Wallet' section in the 'Home Screen Settings' dialog, which lists various widgets with heart icons for favoriting and toggle switches for showing/hiding them. A third red callout points to the 'Save' button at the bottom of the 'Home Screen Settings' dialog. A fourth red callout points to the 'Template Widget' in the 'Widget Wallet' list. A fifth red callout points to the 'Spending' widget in the 'Widget Wallet' list.

Customize Home Screen

Hello, Sam

Messages for you

High-Yield Certificates of Deposit

Welcome to digital banking!

Celebrate the holidays with \$100 referrals.

Learn More

Need Help?

Learn More

Internal Accounts

Total Loan Accounts

Total Investment Accounts

Total Deposit Accounts

ABS Account

Business OFX Checking

Manage Cards

Make a Transfer

Make A Payment

Budgets

\$30,482.00

\$5,800.78

\$4,836.47

\$844.75

****026

****101

Home Screen Settings

Greeting Name

Name

Sam

Widget Wallet

Budgets

Insights

Template Widget

Turbo Tax

CCPA Privacy

Spending

Cancel

Save

Change your Greeting name

Select and drag to change the widget order

Toggle to remove or add a widget to the stack

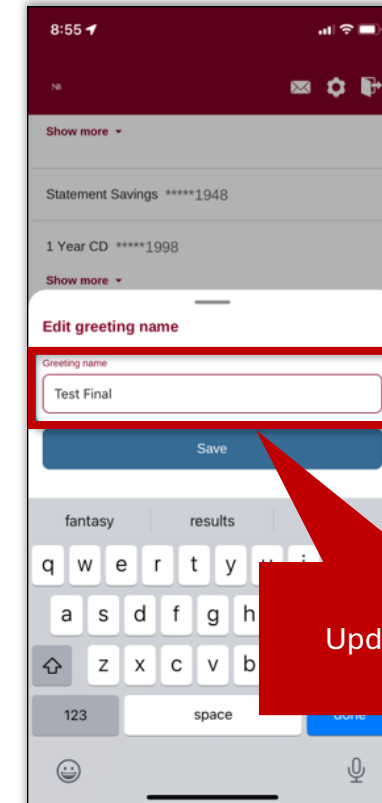
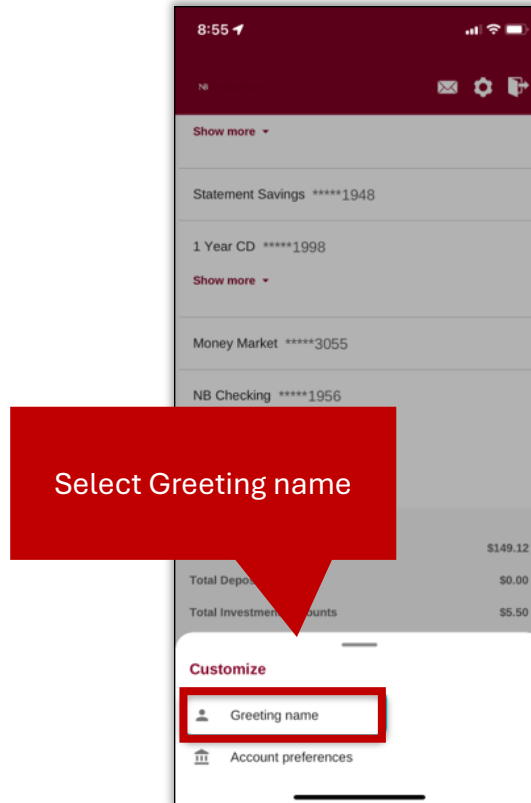
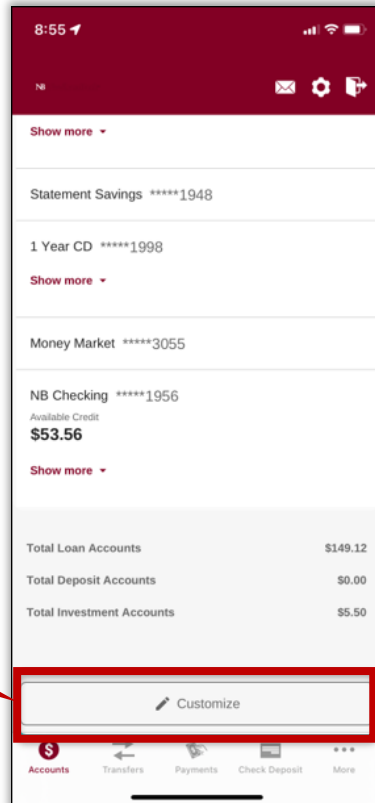
“Favorite” a widget using the heart icon. Multiple widgets can be favorited at one time. There is no limit to the number of widgets you can favorite.



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Customizable Homepage: Mobile

In the mobile app, the Customize Home Screen button will appear at the bottom of your homepage, labeled "Customize." There is no Widget Stack in mobile, so the Customize button will allow you to change your Greeting name or update your Account Preferences.





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My Accounts Widget

Account Summary:
An overview of your Internal Accounts totals

Show More:
Gives a quick peek of the account information and the five most recent transactions done on that account.

My AccountsMove MoneyManage MoneyAdditional ServicesSecure FormsTurboTax

Customize Home Screen

Hello, Sam

Messages for you

High-Yield Certificates of DepositWelcome to digital banking!Celebrate the holidays with \$100 referrals.

Learn MoreNeed Help?Learn More

Internal Accounts

Total Loan Accounts\$5,800.78

Total Investment Accounts\$4,836.47

Total Deposit Accounts\$844.75

ABS Account

*****026

Available Credit

\$12,293.28

Show more

Apply for a Loan

Make a Transfer

Business OFX Checking

*****101

Available Credit

\$5,202.63

Show more

Apply for a Loan

Make a Transfer

OFX Business Checking

*****111

Available Credit

\$2,000.03

Show more

Apply for a Loan

Simulator Checking

*****001

Available Credit

\$7,477.6

Show more

Apply for a Loan

Make a Transfer

Manage Cards

Make a Transfer

Make A Payment

Budgets

Insights

Action Buttons:
Buttons take you to a location with one click or tap. In this example, the user will be taken to apply for a loan or to make a transfer.



Digital Banking Quick Help Guide

Accounts Preferences

Account Preferences has a new look and feel. You can still rename accounts, re-order accounts, and hide accounts.

Account Preferences

Account	Account Nickname	Type	Show/Hide
⋮ Simulator Checking #0001	Simulator Checking	Internal	👁
⋮ Simulator Savings #0002	Simulator Savings	Internal	👁
⋮ ABS Account #0026	ABS Account	Internal	👁
⋮ Simulator Money Market #0003	Simulator Money Market		
⋮ Credit STM LPAY0 #9121	64 Credit STM LPAY0		

Old

Account Preferences

Internal

ABS Account

ABS Account ****0026

👁

Business OFX Checking

Business OFX Checking ****0101

👁

OFX Business Checking

OFX Business Checking ****0111

👁

Simulator Checking

Simulator Checking ****0001

👁

Business OFX Money Market

Business OFX Money Market ****0033

👁

Simulator Money Market

Simulator Money Market ****0003

👁

New

10:09

Account Preferences Done

HIGH YIELD CHECKING 71

HIGH YIELD CHECKING

PRIMARY SHARE 00

PRIMARY SHARE

Pay/Transfer Cards Mobile Deposit More

Old

Account Preferences Close

Internal Accounts

Checking Account W

Checking Account W...

TPV Checking

TPV Checking *****

JNT-Money Market A

JNT-Money Market A... Joint Owner Anto

Savings Account All I

Savings Account All ...

Money Market Accou

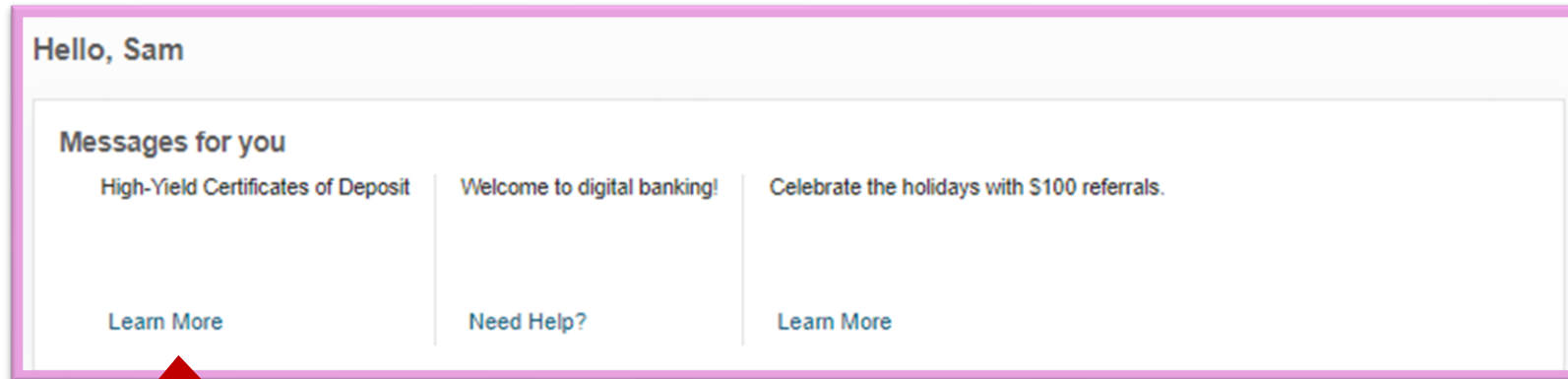
Accounts Transfers Bill Pay Check Deposit More

New



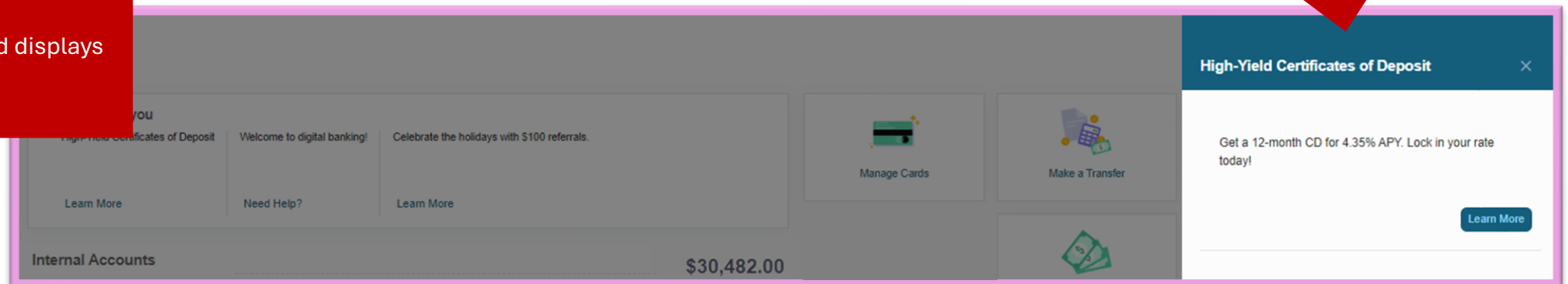
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Message Widget: Online Only



This link opens a “drawer” and displays the full message to you.

Once the action link on the main widget is selected, this drawer will open to display the full message.

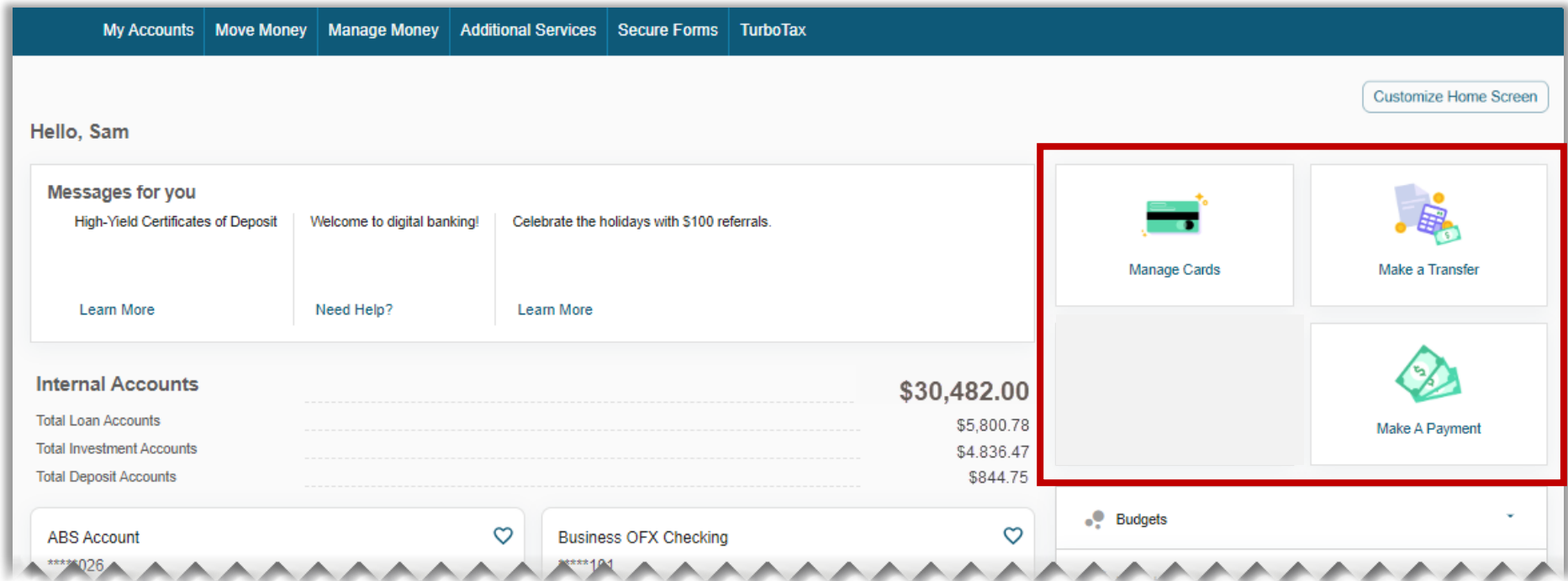




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Quick Actions: Online Only

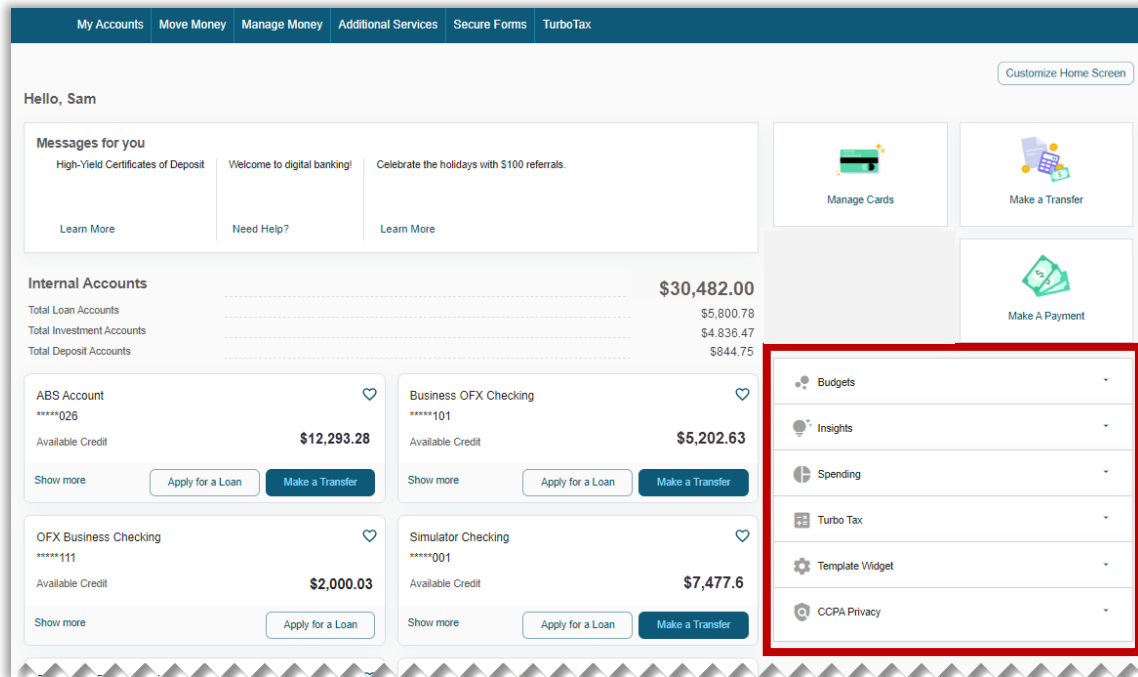
Quick Actions are a way to navigate through Online Banking quickly and easily, and they link to highly-visited features. The Quick Actions for OHecu’s Online Banking are Apply for a Loan, View Statements, and Make a Transfer.



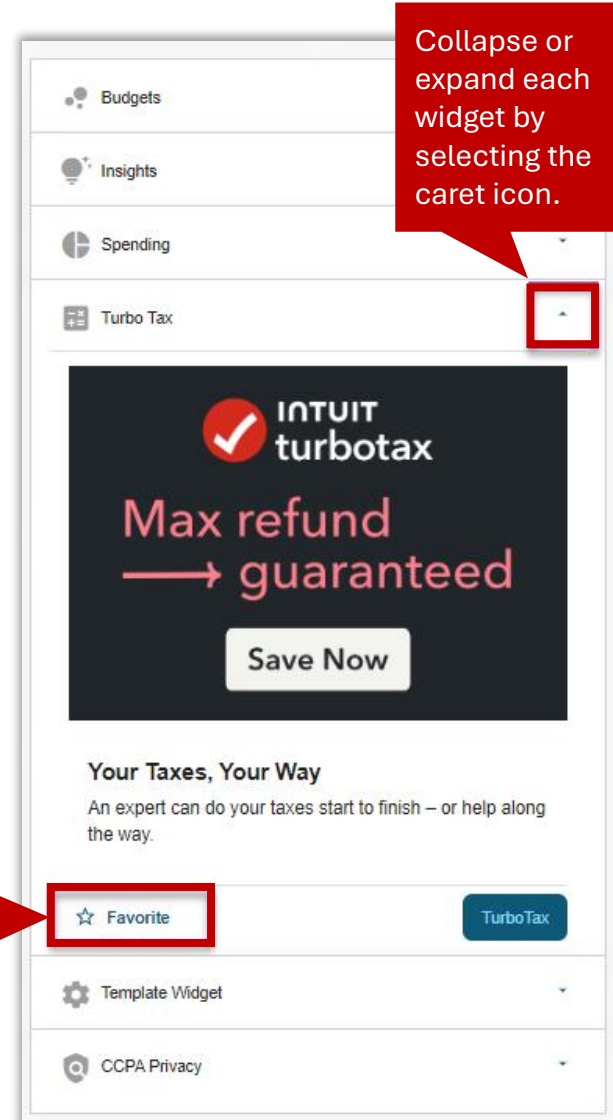


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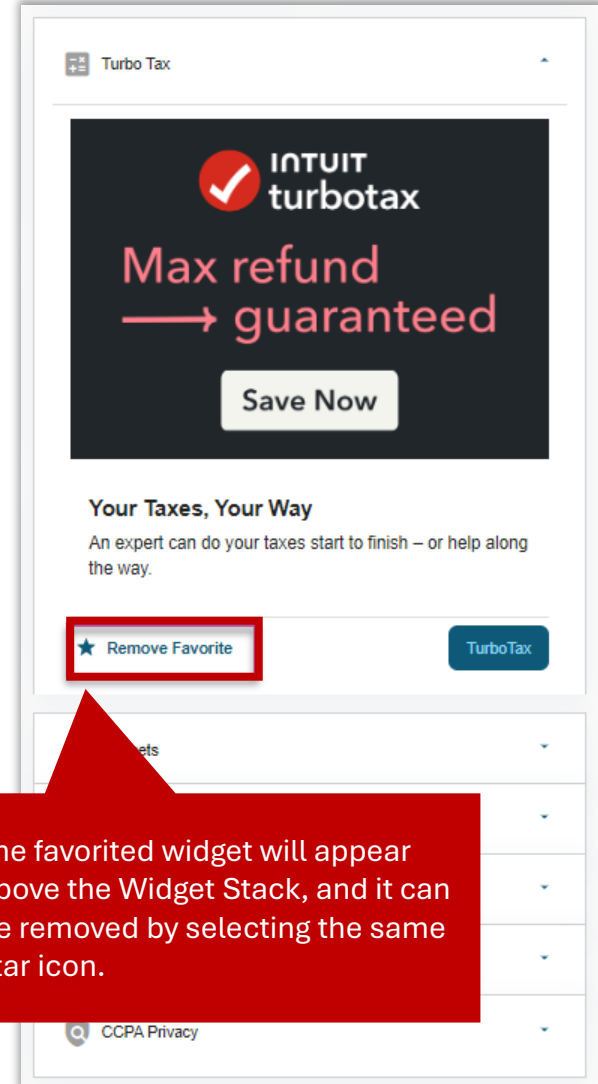
Widget Stack: Online Only



“Favorite” a widget by selecting the star icon.



Collapse or expand each widget by selecting the caret icon.



The favorited widget will appear above the Widget Stack, and it can be removed by selecting the same star icon.