



Account Management Quick Reference Guide

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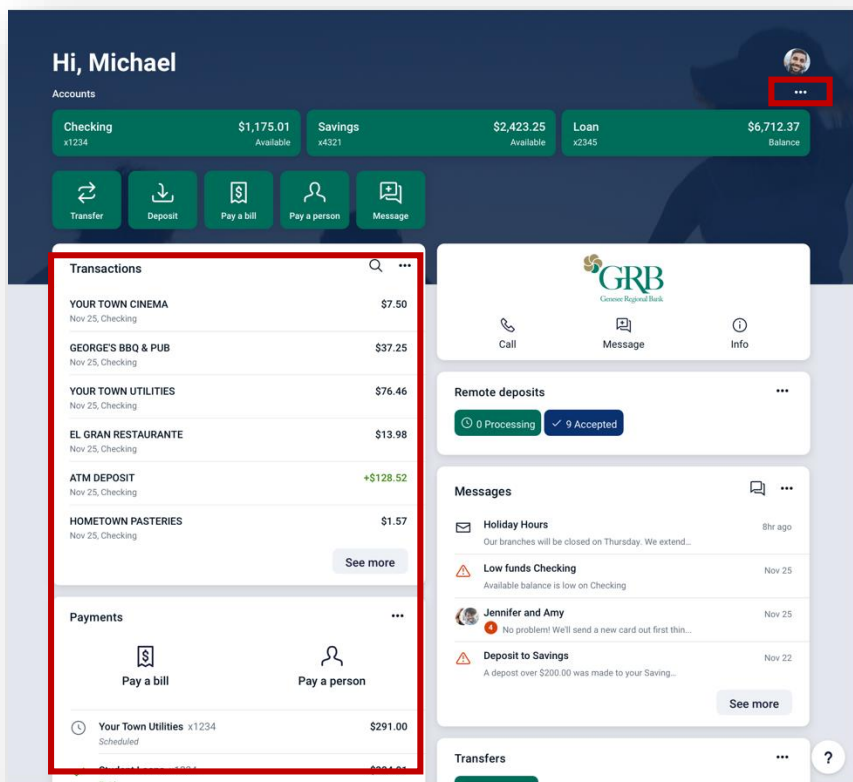
Account Management

Quick Reference Guide

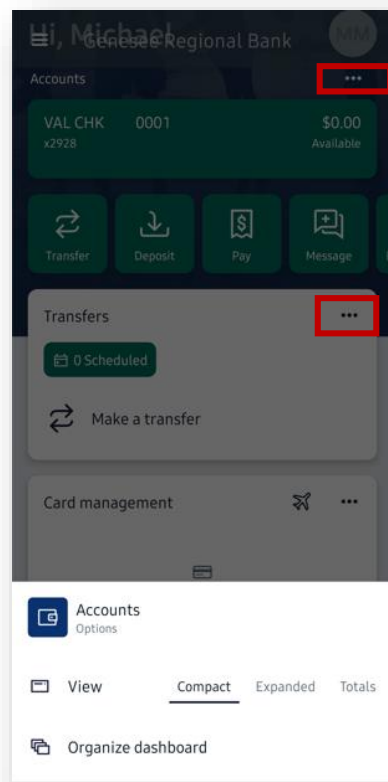
Organize and customize the Dashboard cards to what you want to see at a glance.

Organize Dashboard

- Tap the “...” in the upper right corner of any section to reorganize the dashboard layout and adjust the amount of information displayed in each section.
 - You can also scroll to the bottom and click organize dashboard.



Desktop View



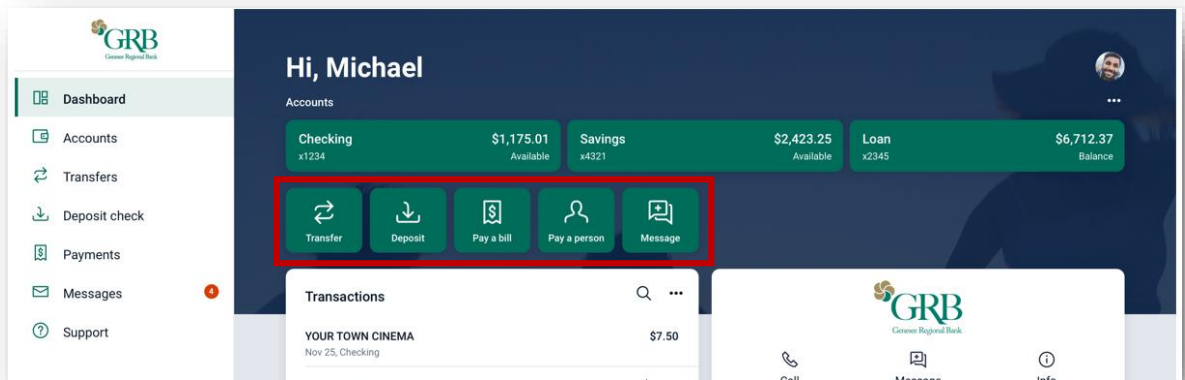
Mobile View



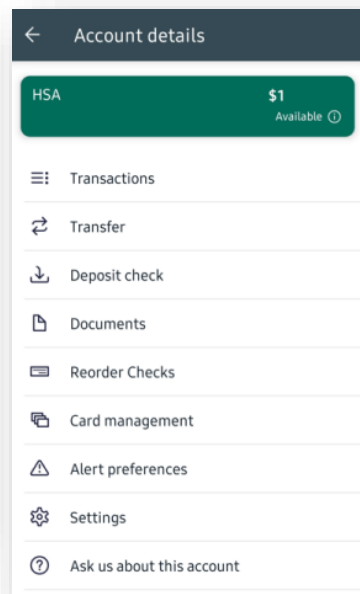
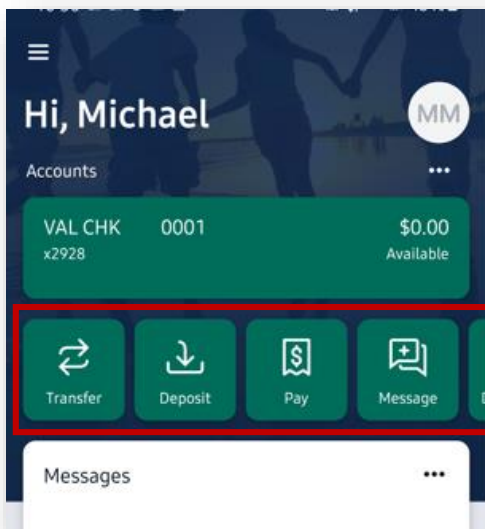
Dashboard – Quick Action Icons

- Use the Dashboard quick actions icons to quickly access features like transfers, paying a bill, paying a person, sending us a message, or viewing/making (on a mobile device) mobile deposits.
- Many of the Quick Actions can also be accessed from the Menu on the left or the flyout menu on mobile

Desktop View



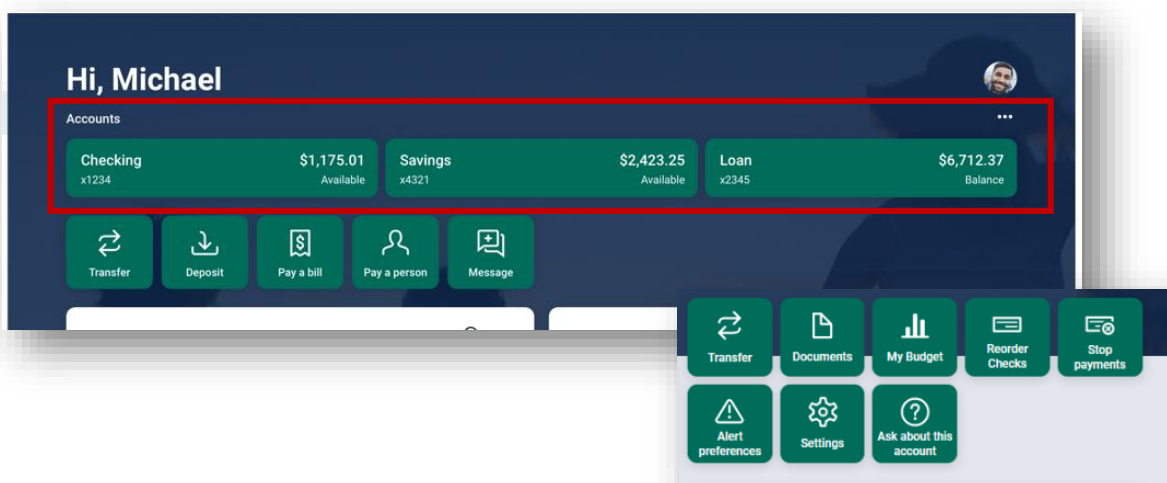
Mobile View



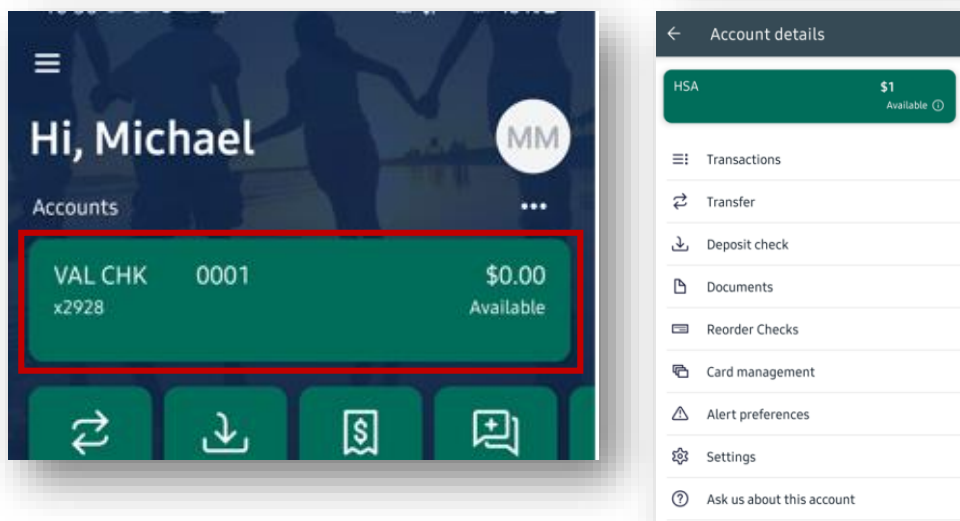
Dashboard – Accounts

- View your accounts and available balances.
 - Flip through all your accounts by swiping the Accounts section left or right.
- Click into an Account to access more quick action icons including:
 - Transfers, viewing documents (e-statements), accessing *My Budget*, Ordering Checks, Making Stop Payments (not available on Mobile), setting alerts, account settings, and to message GRB about the account

Desktop View



Mobile View



Account and Transactions

- View transactions across all your accounts from the dashboard **Transactions** section. To view transactions for a single account, select the Account from the dashboard.
 - Search for transactions by using the magnifying glass in the upper right of the Transactions section. Use the down underlined arrow to download transactions or the printer icon to print transaction list (desktop only).
 - Select any posted transaction to add a tag, note, or attach an image, such as a receipt.
 - See additional transaction details by clicking on the specific transaction.

Checking x0000 \$6,737.24 Available ⓘ

Activity

Activity	Amount
YOUR TOWN CINEMA Nov 25	\$7.50
GEORGES BBQ & PUB Nov 25	\$37.25
YOUR TOWN UTILITIES Nov 25	\$76.46
EL GRAN RESTAURANTE Nov 25	\$13.98
TRANSFER FROM CHECKING Nov 25	-\$128.52
HOMETOWN PASTERIES Nov 25	\$1.57
FILL UP GAS STATION Nov 25	\$29.31
THE TODDLERS TENT CLOTHING Nov 25	\$18.36
EMPLOYMENT GOODS OFFICE SUPPLY Nov 25	\$16.04
PAMPERED PETS SHOP Nov 25	\$19.35
ELECTRONIC ERIC COMPUTER & PHONE REPAIR Nov 25	\$219.12
GEORGES BBQ & PUB Nov 25	\$19.81
HOMETOWN PASTERIES Nov 25	\$12.33

Transfer Documents My Budget Reorder Checks

Stop payments Alert preferences Settings Ask about this account

Card management

Michael Smith
1234 - Active

Details

Account numbers

Account number ⓘ 100000000
Routing number 022313021

Account information

Owner Michael Smith
Date opened 10/05/2011 ⓘ

Activity ⓘ

Desktop View

← Transactions ⓘ

Checking x1234 - 2 min ago \$1,175.01 Available ⓘ

Mon, Nov 25

YOUR TOWN CINEMA	\$7.50
GEORGES BBQ & PUB	\$32.25
YOUR TOWN UTILITIES	\$76.46
Entertainment	
YOUR TOWN UTILITIES	\$13.98
Need to split this bill with Bernard...	

Mobile View



Account and Transactions

- **Card Management:** Turn debit and credit cards on or off, report them lost or stolen, activate a new card, add travel notices and other debit card alerts.
 - See [Card Management Reference Guide](#) for further details
- **Details:** View accounts details such as account and routing number, interest rate, previous balances, etc.

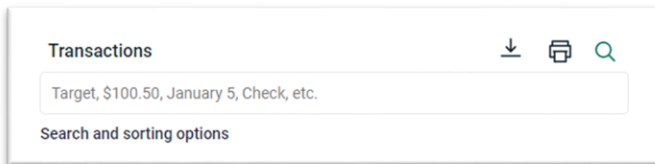
The screenshot displays a mobile banking interface for a checking account. At the top, the account name 'Checking' is shown with a dropdown arrow, and the balance '\$6,737.24' is displayed in large text, with 'Available' and an information icon below it. The account number 'x0000' is visible. Below the header is a grid of action buttons: Transfer, Documents, My Budget, Reorder Checks, Stop payments, Alert preferences, Settings, and Ask about this account. A list of transactions follows, including 'YOUR TOWN CINEMA', 'GEORGE'S BBQ & PUB', 'YOUR TOWN UTILITIES', 'EL GRAN RESTAURANTE', 'TRANSFER FROM CHECKING', 'HOMETOWN PASTERIES', 'FILLR UP GAS STATION', 'THE TODDLERS TENT CLOTHING', 'EMPLOYMENT GOODS OFFICE SUPPLY', 'PAMPERED PETS SHOP', 'ELECTRONIC ERIC COMPUTER & PHONE REPAIR', and another 'GEORGE'S BBQ & PUB' entry. A red box highlights the 'Card management' section, which shows 'Michael Smith' with a card number ending in '1234' and the status 'Active'. Below this is a 'Details' section with 'Account numbers' (Account number: 100000000, Routing number: 022313021) and 'Account information' (Owner: Michael Smith, Date opened: 10/05/2011). An 'Activity' section is partially visible at the bottom.

Desktop View



Transaction Searching, Tagging, Notes, and Images

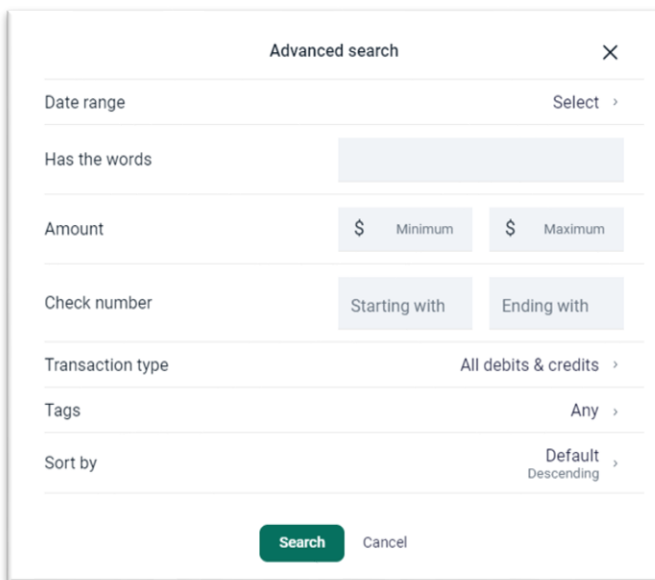
- Search transactions by multiple ways; tags, descriptions, amount, type, etc.
 - Click the *Search and sorting* options for advanced searching.
- Select any posted transaction to add a tag to quickly identify or search similarly categorized transaction.
 - Add a note, or attach an image, such as a receipt for future reference.
- **On mobile**, you can take a picture of a receipt or use an existing photo.
- **On desktop**, you can select a saved image from your computer.



Transactions

Target, \$100.50, January 5, Check, etc.

Search and sorting options



Advanced search

Date range Select >

Has the words

Amount \$ Minimum \$ Maximum

Check number Starting with Ending with

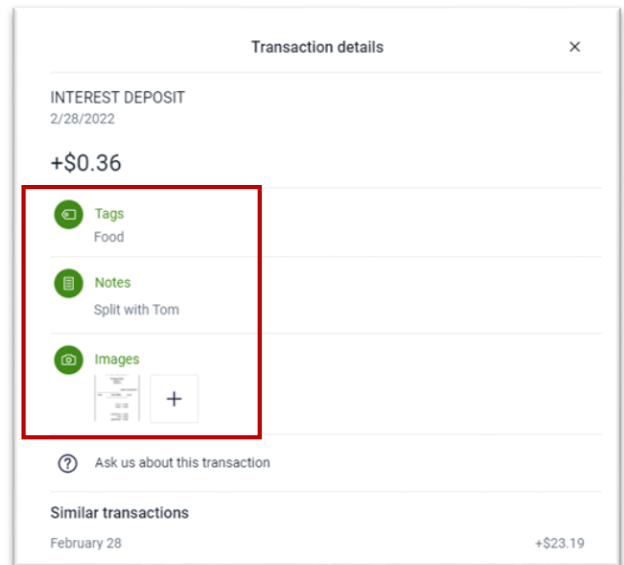
Transaction type All debits & credits >

Tags Any >

Sort by Default Descending >

Search Cancel

Desktop View



Transaction details

INTEREST DEPOSIT

2/28/2022

+\$0.36

Tags Food

Notes Split with Tom

Images

Ask us about this transaction

Similar transactions

February 28 +\$23.19

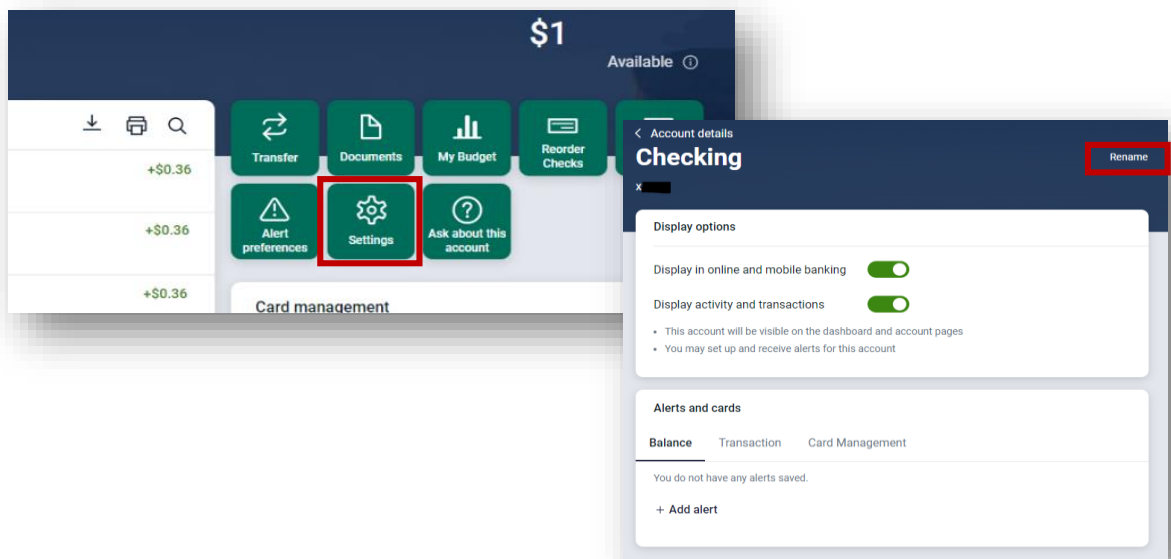
- Tags and Images will show on all devices. Notes will only show on the device you added it to.



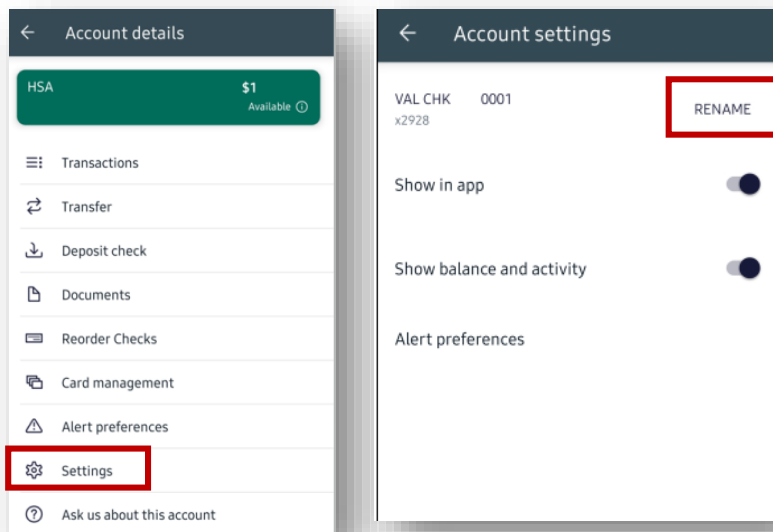
Account Settings

- View your accounts settings by clicking the **Settings** icon within your account
- Rename account by clicking *Rename* in upper right.
- Manage account displaying options
- Set up account specific alerts

Desktop View

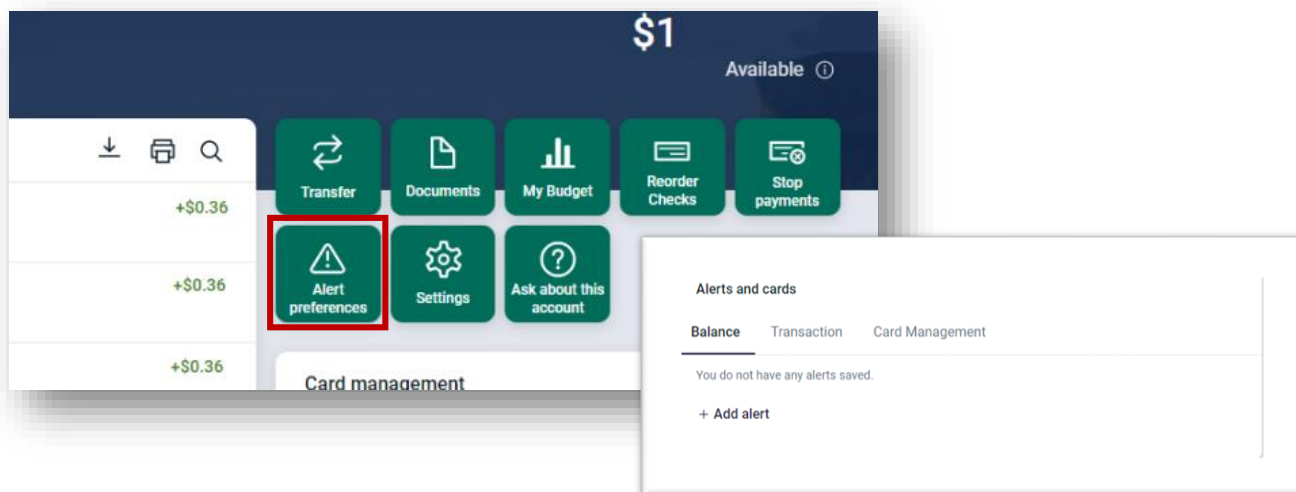


Mobile View



Account Alerts

- To set alerts, access your account and click *Alert preferences* icon. You can also access through *Settings* icon
- To create alerts, click *+ Add alert*
- Add Balance, Transaction, or Debit Card related alerts.
 - See [Card Management Reference Guide](#) for details on debit card alerts
- Complete the alert form and click *Add Alert*



Alerts and cards

Balance Transaction Card Management

You do not have any alerts saved.

Notify me when my balance is:

under \$

Notify by:

Text (585) 329-5249 Email nicole.cirincione@gmail.com In-App Message

Need to update your contact information?

Cancel Add alert

Alerts and cards

Balance Transaction Card Management

You do not have any alerts saved.

Notify me when a

Credit (deposit or earning)

over:

\$

Notify by:

Text (585) 329-5249 Email nicole.cirincione@gmail.com In-App Message

Need to update your contact information?

Cancel Add alert



Account Management - Alerts FAQs

Q. Can I receive alerts regarding my accounts?

A. Yes, you can set up alerts regarding your account balance, transactions and Debit Card usage. When you set up Alerts, you will receive a notification via email, text, or within our app. Bill Pay Alerts can be set up in Bill Pay under Payments. User Alerts, which can be accessed from your User Settings are notifications pertaining to your account such as logins from a new device, or changes to passwords and personal information.

Q. Will my previously created account alerts from GRBonline be transferred to GRBbank?

A. Alerts will need to be re-entered via GRBbank. Luckily, it's easy! See "How do I set up account alerts?"

Q. How do I set up account alerts?

A. Alerts are unique for each account, so you can set the alerts to work best for you. To set up your alerts, click your account and choose Alert preferences. There is a Balance, Transaction, and Card Management (if you have a debit card with GRB) section. For Balance and Transaction alerts, choose + Add alert and fill out the details. You can choose to be alerted by text, email, and/or in-app message. When using the GRBbank app, you can enable push notifications for alerts to be sent to your lock screen.

- **For Card Management alerts**, please see the [Card Management FAQs here](#).
- **For User alerts**, click on your name from the bottom of your menu, go to Settings and select User alerts.

B. How do I edit or delete an alert I'm receiving?

A. To view your existing alerts, click your account and choose Alert preferences. Your existing alerts will be listed and each will have an Edit option. Choose Edit to change the amount, notification method, or remove the alert all together.



Account Management - Alerts FAQs

Q. How do I nickname or rename an account?

A. Select the account you wish to rename. Click *Settings*. Click Rename next to the account name at the top. Type in your new name and hit *Save*.

Q. How do I change the order of my accounts?

A. Select Accounts from your menu, scroll to the bottom of your account list, and click *Organize accounts*.

Q. How do I hide an account from GRBbank?

A. Click on the account you wish to hide, select *Settings* and toggle the slider off next to "Display in online and mobile banking" or "Show in app" from the mobile app.

Q. How current is the account information I access through online banking?

A. Items posted to your account and pending items are viewed in real time.

Q. Where can I find my account number?

A. Your account and routing numbers are listed in the Details of your account. Click on any of your accounts to view this information.



Account Management - Alerts FAQs

Q. How do I search for transactions?

A. You can search all transactions, from all of your accounts, on the Dashboard by selecting the magnifying glass icon from the Transactions card. You may narrow your search down to a specific account by going into the transactions of the account you're looking to search and selecting the magnifying glass icon. Account transactions can be searched by amount, date, tags, etc. On the desktop, you can click on the Search and sorting options to open advanced search options.

Q. How do I add a tag, note, or image to a transaction in digital banking?

A. You can add notes, tags, and images to any transaction. Select the account and transaction you wish to notate. Click on the appropriate icon for one of the following: Add tags, Add notes, Add images. Follow the on screen prompts to update the transactions. Any tags, and images attached to transactions will be accessible on all devices.

Q. How do I export my account transactions?

A. When viewing your account activity, choose the download option next to the print icon at the top of the Transactions card. Looks like an underlined down arrow. Note: downloading transactions can only be completed using the desktop, not mobile.

Q. Where can I find copies of my check images?

A. Simply find the check you'd like to view in your account and click on the green image.

Q. How can I place a stop payment on a check in GRBbank?

A. You can place a stop payment on a check by selecting the account the check was written off of. Click the Stop payments icon. Follow the prompts. Note: Stop payments can only be completed using the desktop, not mobile.

Q. Can I reorder checks from GRBbank?

A. Yes, you can order checks by selecting your account and clicking on Reorder Checks. You will be redirected to our check provider's website. This can be done in both desktop and mobile.

