MyPoint Credit Union

Navigating Online Banking: Tips and Tricks

Log On Screen

- Enter User Name
  - Enter Password.

- If you forgot your password or have trouble accessing your account click on the forgot button.
  - Please contact our Call Center at 888-495-3400 during normal business hours for assistance.

Dashboard

- The dashboard is customizable by clicking on the organize dashboard button at the bottom of the page. Select the features you would like to see on your dashboard and in what order.

Accounts

- Click on any of the accounts to open another menu with the following features:
  - Transfer
  - **Transfer from one account to another**
    - More Options
    - Set the frequency
    - Date
    - Memo – a memo or comment
    - Make External Transfers with Another Financial Institution
    - **To add an external account click on add account.**
      - Enter Account name
      - Enter Routing number
      - Enter Account number
      - Select Account type
      - Two micro deposits will be sent to the other financial institution within 3-5 days.
      - Once the amounts have arrived notate them and sign back into your MyPoint Online Banking, click on Transfer, then External Transfers, you will then be prompted to input the two amounts.

Accounts Cont.
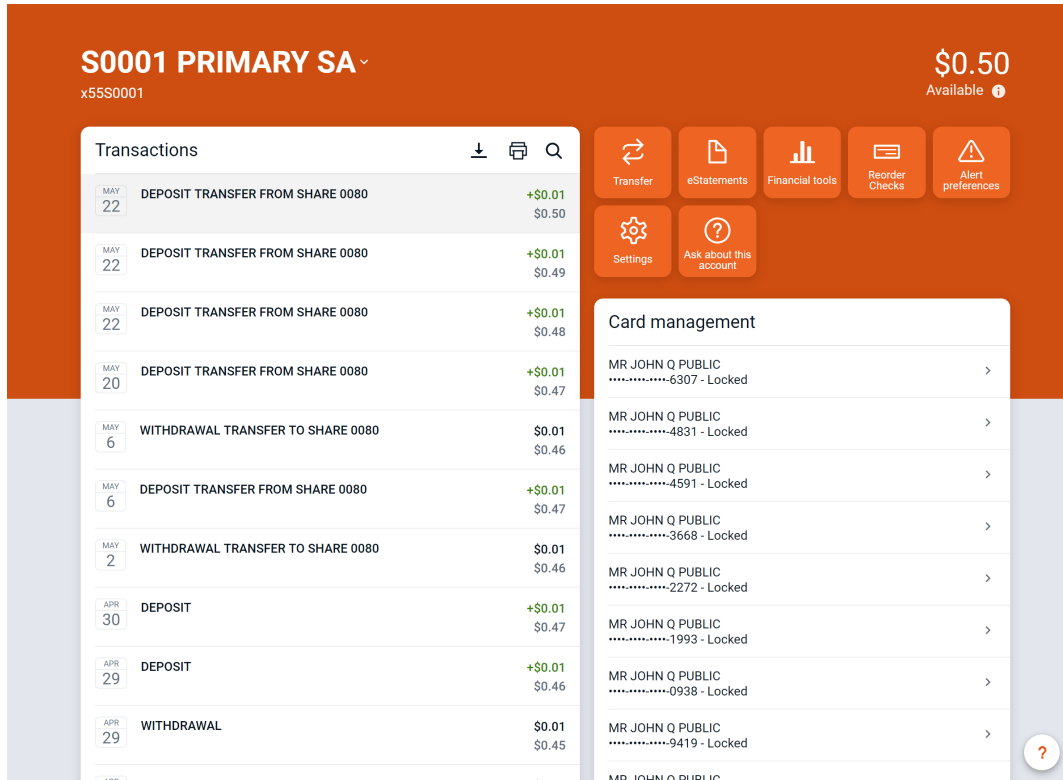
- **Reorder Checks**
    - Confirm the account and routing number and follow the screen prompts
- **Alert Preferences** – create and manage balance and transaction alerts
    - Receive alerts via
    - Text
    - Email
    - In application message
- **Settings**
    - Rename a share
        - Edit alert settings
        - Radio button to turn off a share from displaying in online banking.
        - Radio button to show balance and activity of a particular share.
- **Ask About a Transaction**
    - Add to an existing conversation with the credit union.
    - Start a new conversation with the credit union.

Accounts: Transactions
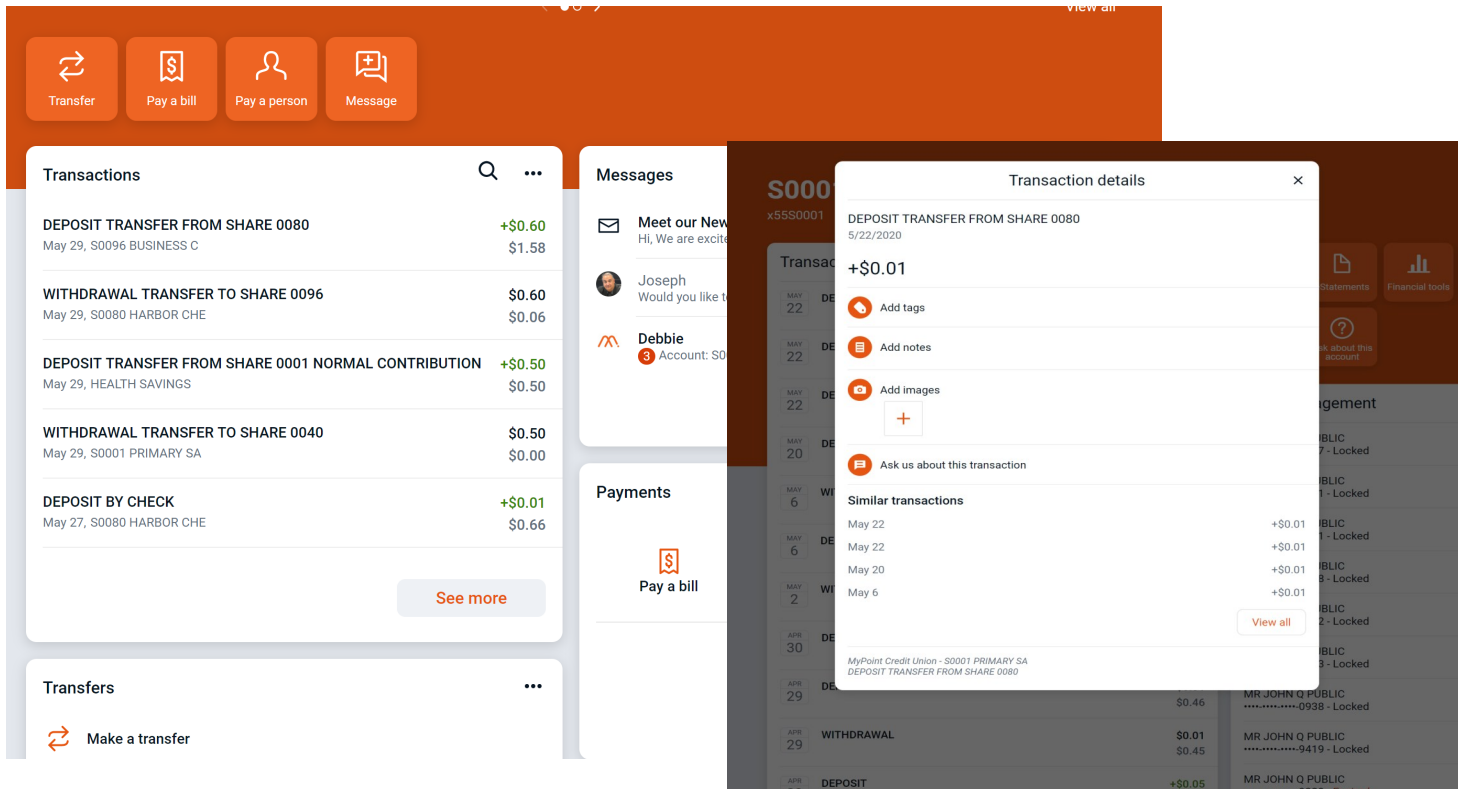
- At the top of the transactions bar are three icons:
    - Download activity
    - Select the date range
    - Select the file type
    - Print – ability to print the transaction activity
- Search
    - Click on Search and Sorting Options
    - Select how you would like to search for a transaction
        - Date
        - Keywords
        - Amount
        - Check Number
        - Transaction Type
            - Sort by
            - Obtain additional details
            - Add Tags
            - Add Notes
            - View the front and back images of a check written on the share.

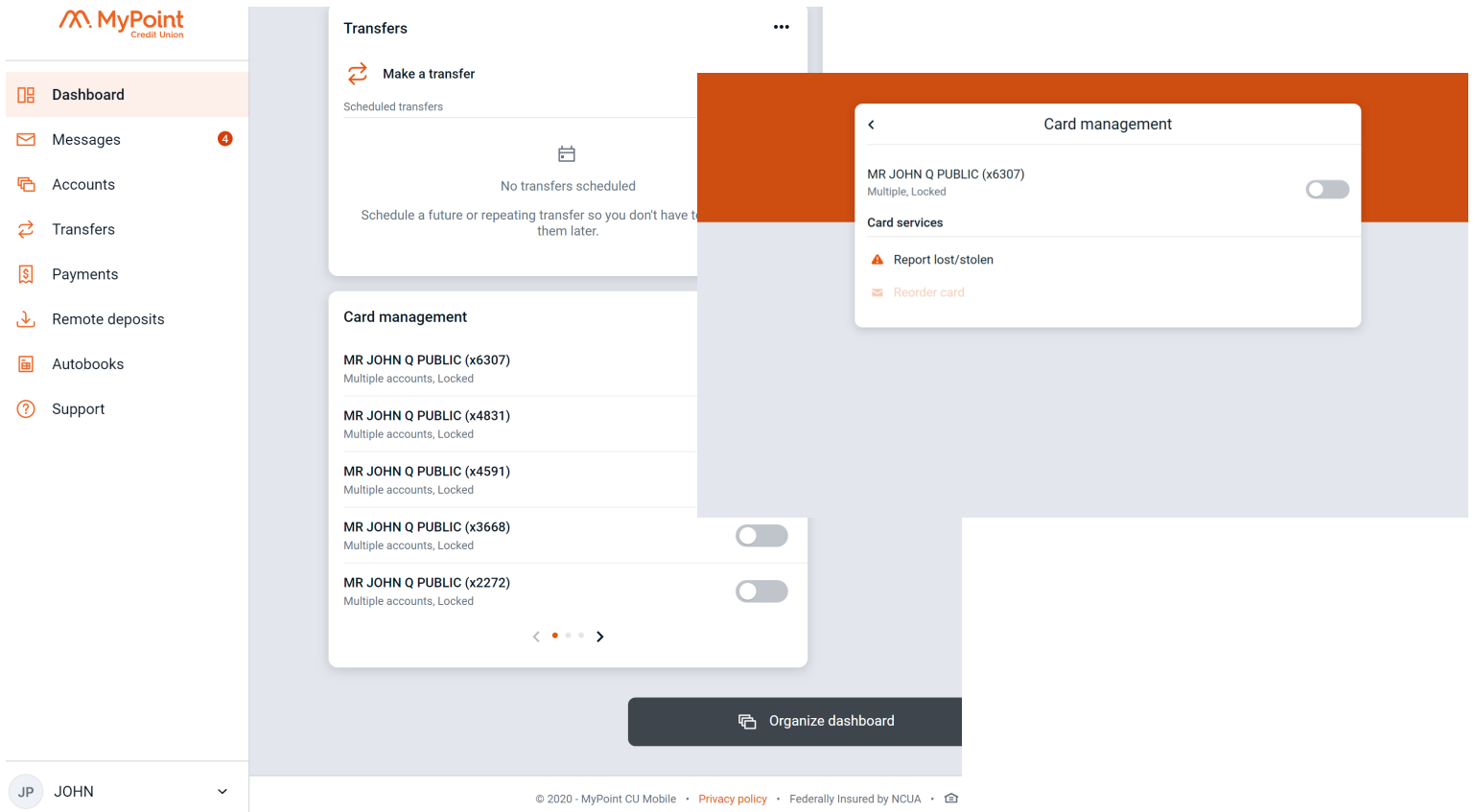# Accounts: eStatements

- When you click on an account, in the top right options menu, you can click on eStatements to view all of your account statements for the past 24 months.

Accounts: Financial Tools
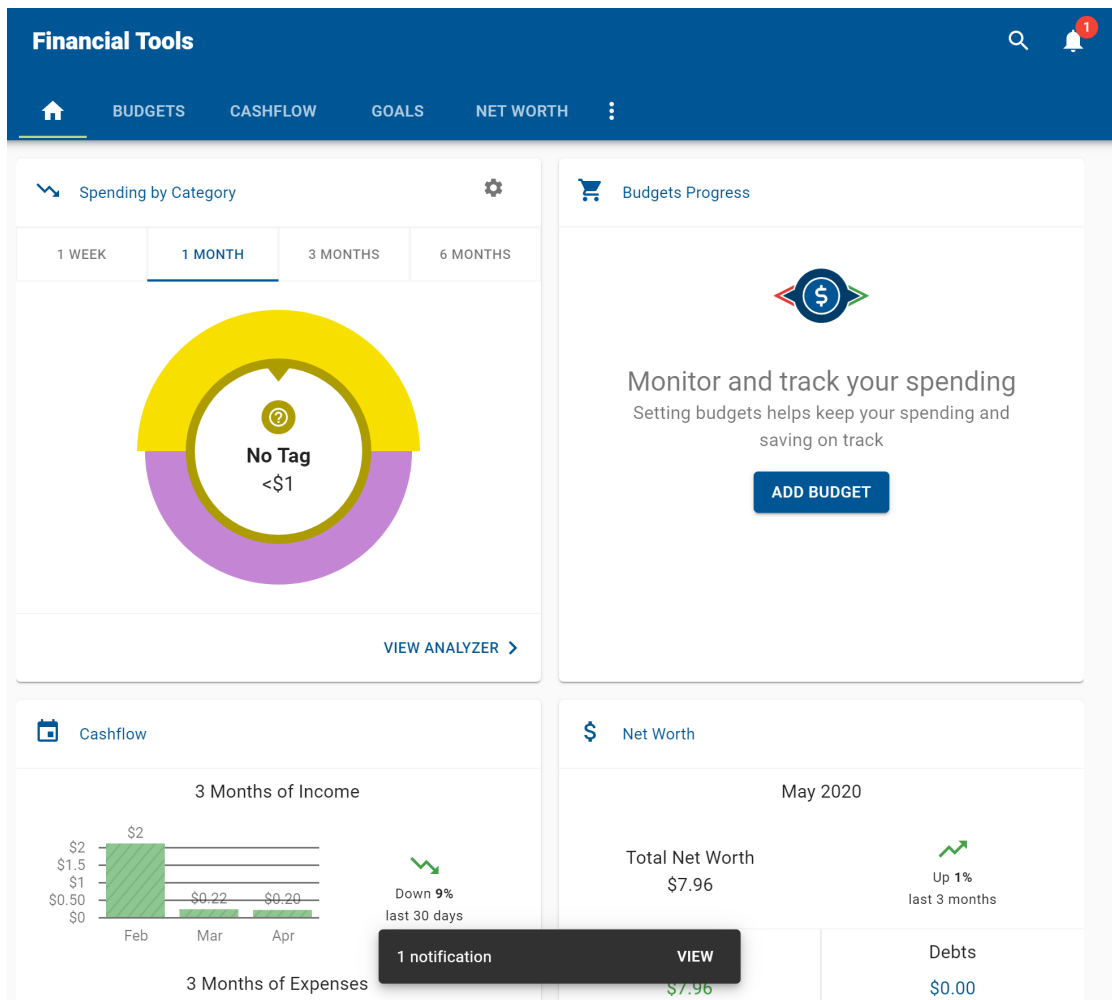
- Financial Tools – this is an online financial management application.
- Create budgets
- Track cash flow
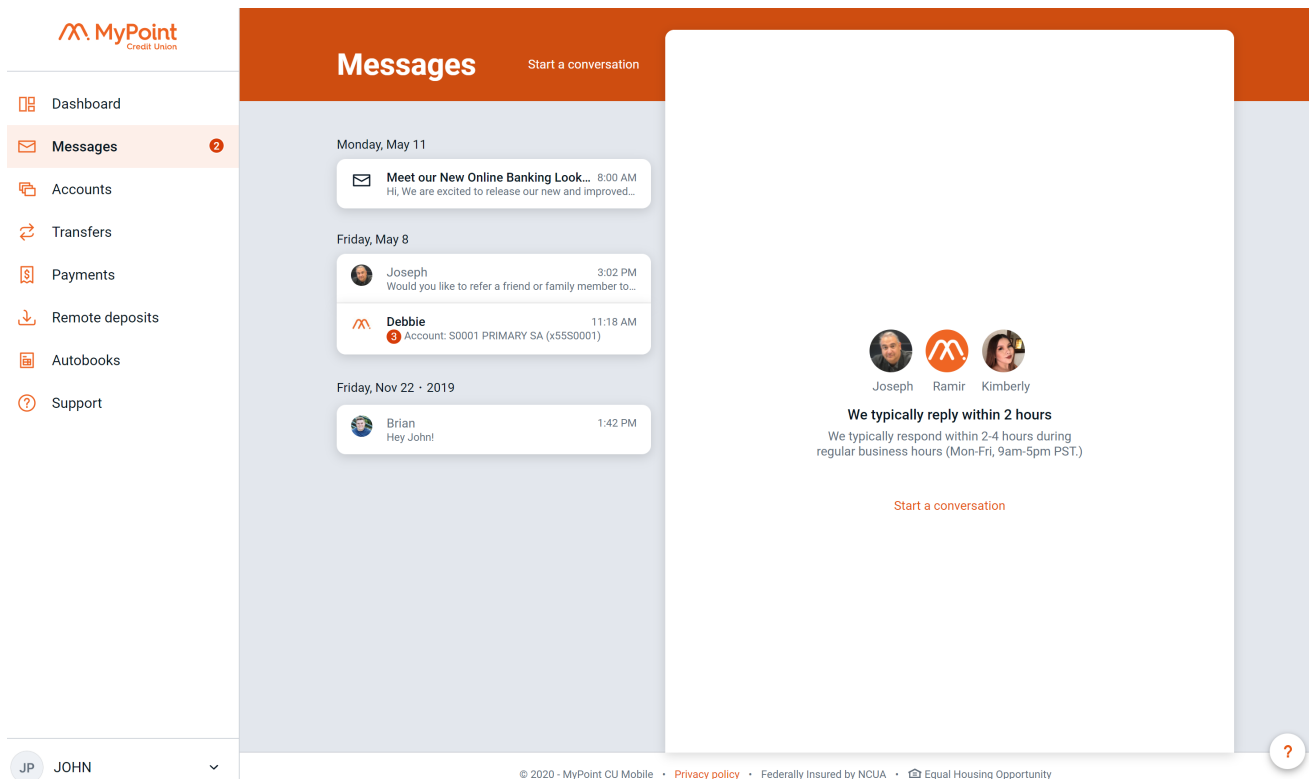- Set goals
- Monitor net worth

Dashboard: Card Management

- View Card Controls
- Turn a card on or off
- Report a card lost or stolen
- Request a new card with the same card number.

Dashboard: Messages

- Start a Conversation
  - Alerts for new messages and conversations from the Credit Union will show as a number in an orange circle.
  - Type in a message to start a conversation with our Call Center.
  - Click on the + to the left of the words type your message.
- Files
  - Upload a file to send, including but not limited to:
  - Pictures
  - Word Documents
  - Excel Document
- Transactions
  - Select a specific transaction that you want to review.
- Accounts
  - Select a specific account that you want to review.
- Payments
  - Select a specific payment that you want to review
- Review history of previous conversations

Dashboard: Payments

- This tab is for Bill Pay
- Pay a single bill
- Pay multiple bills

Dashboard: Remote Deposits

- This tab is used for making a check deposit from a mobile device.

- See a list of enrolled accounts.

- Click enroll another account to add additional shares

- **Click on deposit a check**

  - Enter the check amount

  - Select the share

  - Take a picture of the front of the check

  - Take a picture of the back of the check

  - Submit the deposit

Dashboard: Support

- Information about MyPoint Credit Union

- Contact Us Information

- Start a Conversation

Account Settings
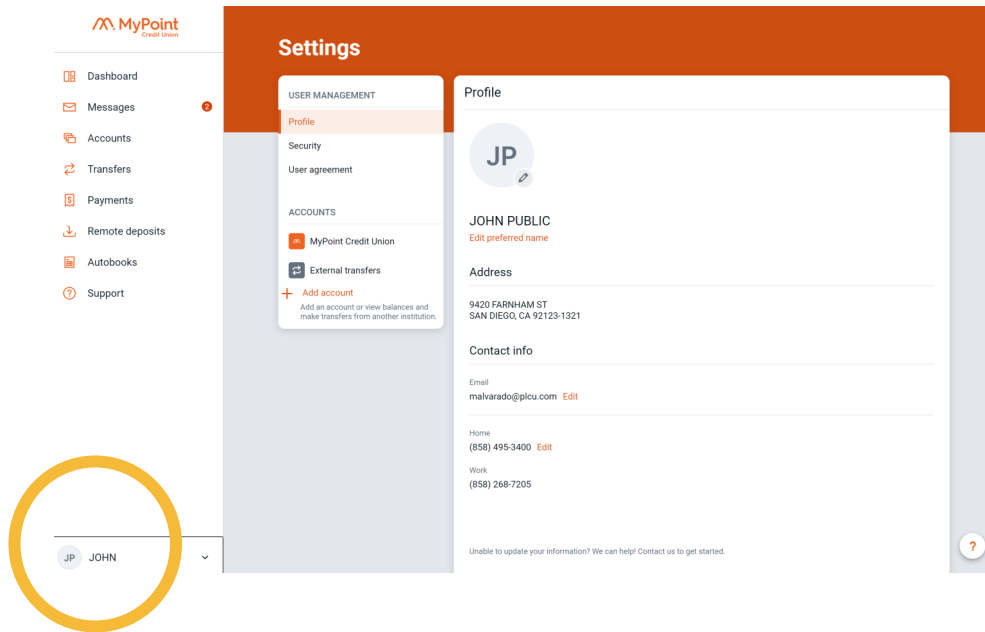
- Click on your name

- This tab is for user management settings

- Profile

  - Upload a profile picture

  - Edit your preferred name

  - Contact Information

  - Edit email

  - Edit phone numbers

- Security

  - Edit Username

  - Edit password

  - Reset the phone used for two factor authentication

  - See a list of recently used devices

  - Remove a device you no longer use

Account Settings Cont.
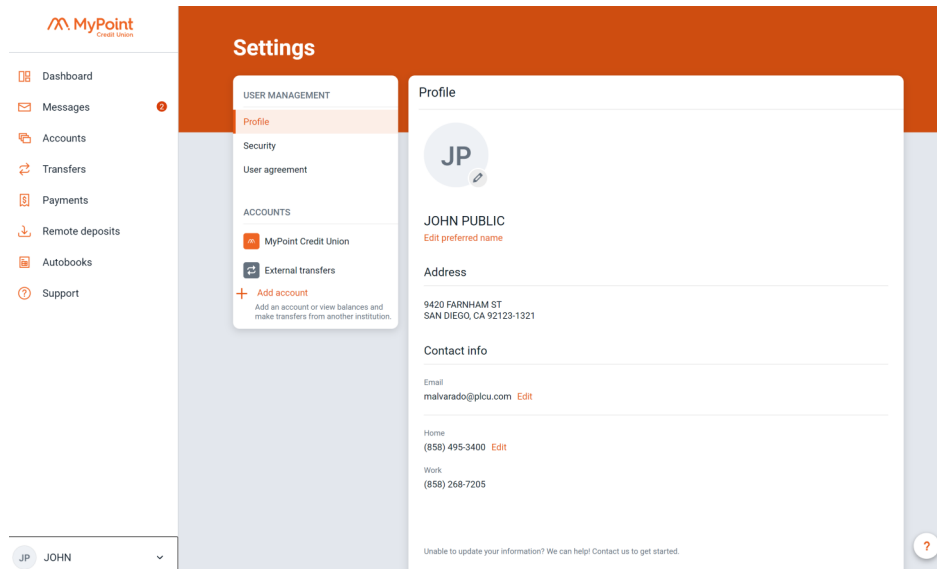
- User Agreement – view the End User Agreement

- Accounts

  - MyPoint Credit Union

  - View a list of all accounts and manage options

- External Accounts

  - View a list of external accounts

  - Remove an account

  - Add an account

Sign Out
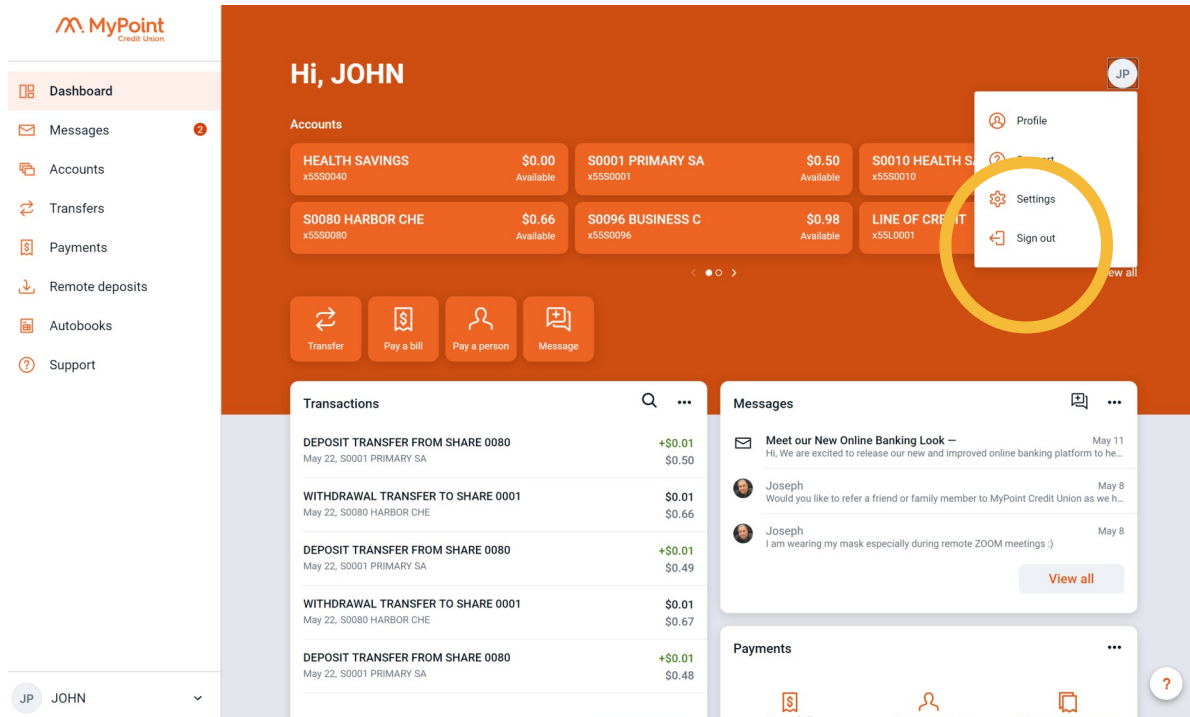
- This feature will remove your online banking profile

- Upon your next log in you will be required to enter:

    - User name

    - Password

    - Two Factor Authentication Verification Code

    - Select four digit passcode if using a mobile device

    - If you have clicked on the remember this computer button when signing in the system will remember the device and not require the two factor authentication.

- To close your session when finished exit the webpage and/or close the web browser. Online banking will terminate the session but remember you as a user.