Online Banking: Commonly-Used Features

Find Account Activity

- Go to **Reports** menu and then select *Activity - deposit accounts*.
- Enter the appropriate information, including account and date range.
- Scroll to the bottom of the page and select *Generate report*.
- The **Activity - Deposit Accounts** page appears with a listing of account activity.

Enroll in Online Statements

- Go to the **Reports** menu and then select *Statements & documents*.
- Select *View and maintain document preferences*.
- Under the heading labeled **Delivery Preference**, choose *Online*. Accept the agreement if applicable.
- Select *Save preferences*.

Manage Alerts

- Go to the **Administration** menu and then select *Manage alerts*.
- The **Account Alerts** page appears. Choose an account and select *Go*.
- Choose *Add*, *Change* or *Delete* and enter the information as prompted.
- Choose where to send the alert, then select *Add alert*.
- **Other alerts:** For multiple accounts, select *Set Up Account Alerts*. For non-account-related alerts, select *Non-account Alerts*. To create or delete a personal alert, select *Custom Alerts*.

Access Statements

- Go to the **Reports** menu and then select *Statements & documents*.
- Choose the account and document type and select *Continue*.
- Statements for the last 60 days will appear.
- Open the statement by selecting *Document Date*.
- Other actions: To save a statement, check the box and select *Download selected documents*. To view an older statement (over 60 days), select *Search for older or specific documents*; enter the date range and click *Search*.

Change Account Nicknames

- Go to the **Administration** menu and then select *Manage account information*.
- Select the *Description*.
- Update as desired and then select *Save changes*.

Change Preferences (Contact Information)

- Go to the **Administration** menu. Click *Manage users*.
- Click on the *User ID*.
- Click *Edit Contact Information*.
- Update the appropriate information and click *Save user*.

Transfer Money Between Deposit Accounts

- From the **Welcome** page, go to the **Transfers and Payments** menu. Click *Transfer money - internal*.
- Choose the accounts to transfer from and to, the amount and the frequency.
- Click *Continue*.
- Verify the information entered and click *Transmit*.
- A confirmation page will appear.

Stop a Payment

- Go to the **Account Services** menu. Click *Stop check payments*.
- Enter the appropriate information and click *Continue*.
- Verify the information entered and click *Submit request*.
- A confirmation page will appear.

Add/Change Accounts on Welcome Page

- Go to **Welcome** page and locate the *Important Account Balances* or *Balance Snapshot* panel.
- Click *Edit Accounts* at the bottom of the panel.
- Select appropriate tab (Checking, Savings or Loans) depending on account type.
- Place a check on accounts to add to, or uncheck accounts to remove from, the info panel.
- *Save* and return to **Welcome** page.

View Loan Information

- Go to **Reports** menu and select *Manage loans.*
- Click **Actions** menu to *View loan activity, Make a payment* or *Request an advance*.

Reset Password (Primary or Admin. User)

- Go to **Administration** menu and select *Manage users* then *System Access*.
- Choose a specific user and update. *Save* changes.

Questions?

Contact Bremer Bank at 800-537-0091 for additional assistance.