Snapshot Tab

What's in this Chapter

This chapter describes using the **Snapshot** tab to get just the information you need about your accounts.

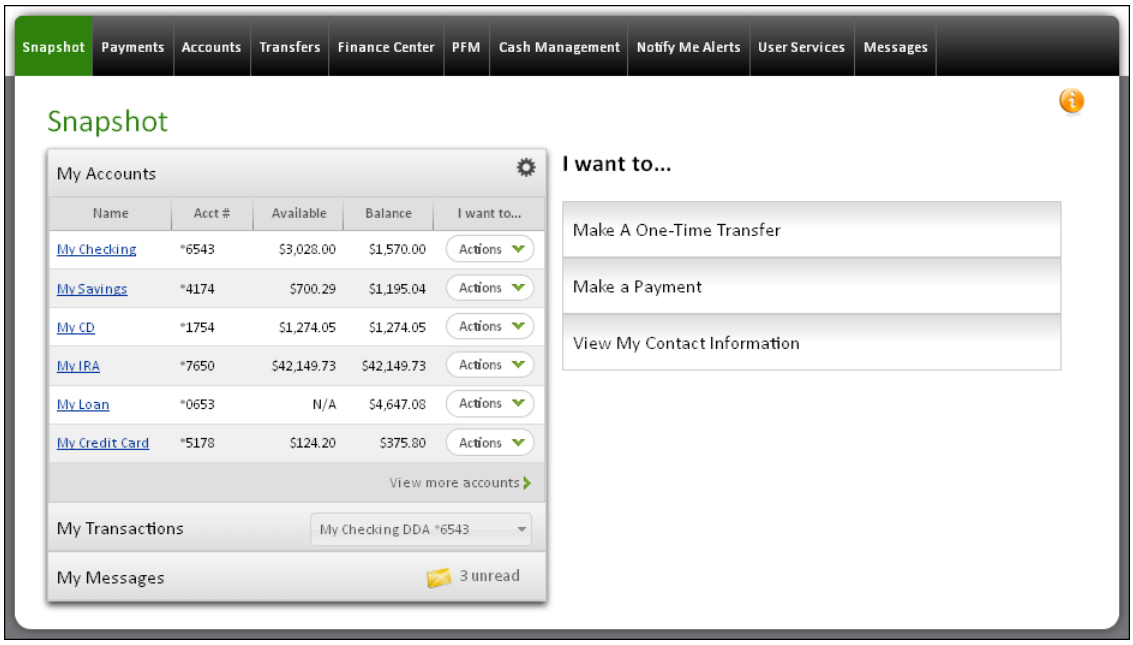
> **Note**
>
> The **Snapshot** tab is an optional feature of Online Banking. For financial institutions that contract for the **Snapshot** tab, all their users see the tab. The tab does not appear for users whose institutions do not offer the feature.

Introduction

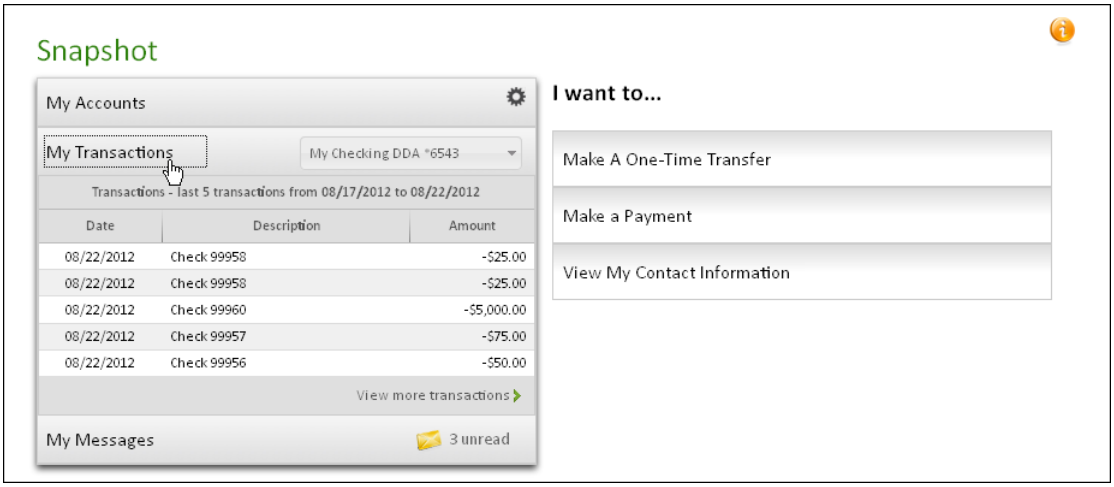
The Snapshot tab provides an overview of your Online Banking accounts in a compact, simplified format. Certain key functions can be performed right on the Snapshot tab. When you need more detail or functionality than the Snapshot tab provides, it has links to let you jump directly to the appropriate pages on other tabs.

Navigating the Snapshot Tab

The Snapshot tab presents its information all on a single page, using several expanding "modules". Initially, the tab displays the My Accounts module:



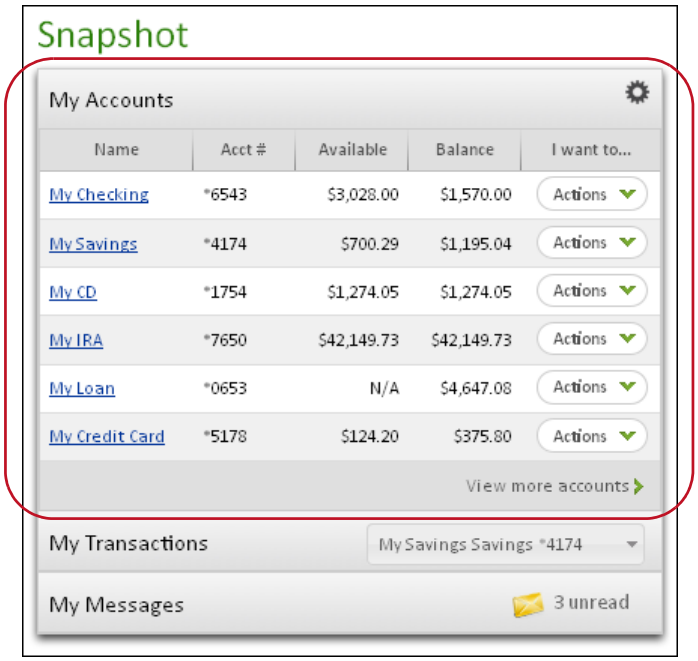
Clicking the header of another module—for example, My Transactions—collapses whichever module was being displayed and expands the selected module:



The information presented in the Snapshot modules is similar to the main Online Banking tabs, but limited in scope and detail. When you need more than a quick overview, use the links and/or **Actions** menus in the module to go to the **Accounts**, **Messages**, or other tabs, where all details are available.

Using the My Accounts Module

The **My Accounts** module lists your accounts.



For each account, you see the following information:

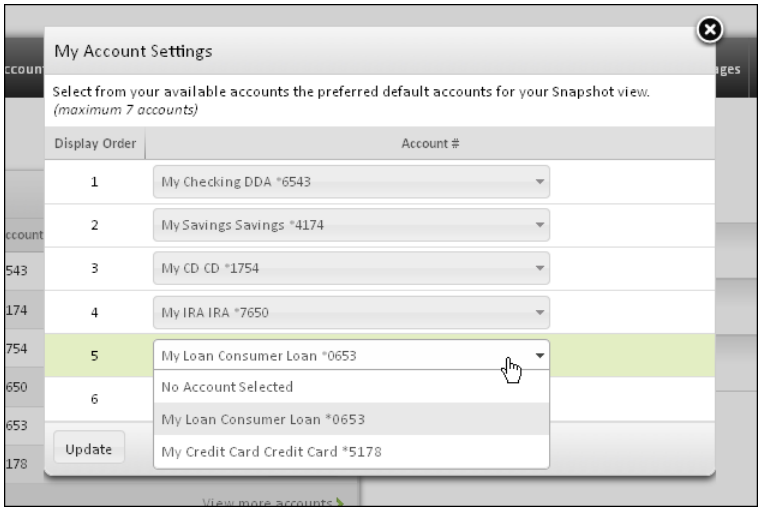
- Name (account nickname—a shortcut to the account detail)
- Account #
- Available (available balance)
- Balance (ledger balance)

As on the Account Summary page of the Accounts tab, each account has an **Actions** menu, with actions that jump to the relevant page on the Accounts or Transfers tabs. Depending on account type, available actions may include the following:

- View Detail (refer to Account Detail in chapter 4)
- View Statement (refer to Account Statements in chapter 4)
- View History (refer to Account History in chapter 4)
- Transfer To (refer to Scheduling a New Transfer in chapter 5)
- Transfer From (refer to Scheduling a New Transfer in chapter 5)
- Make Loan Payment (refer to Scheduling Loan Payments in chapter 5)

Selecting Accounts to View

You can choose which accounts appear in My Accounts, so that you see only those you need to monitor regularly. Click the gear icon in the upper right corner of the module ( ) to open the My Account Settings dialog.

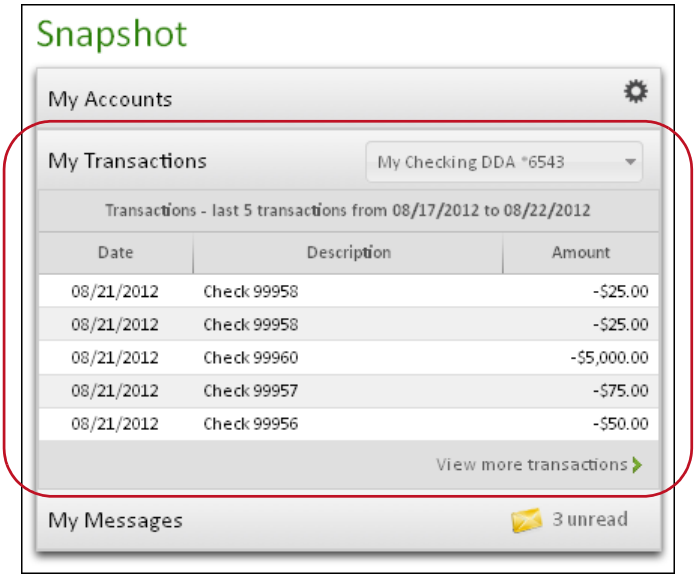


Use the lists in this dialog to select just the accounts you want to see on the Snapshot tab, and the order in which they should appear. To eliminate a listed account select 'No account selected'. Up to 7 accounts can appear in the module. Click **Update** when the desired accounts are in the display order you prefer.

When you need to see all your accounts, or access more detail than is presented here, click the **View more accounts** link in the lower right corner of the module. You go to the Account Summary page of the Accounts tab (refer to Account Summary in chapter 4 for details).

Using the My Transactions Module

Click the **My Transactions** module to see the most recent 5 transactions in the last 5 days for the account shown in the header.



For each transaction, you see the following information:

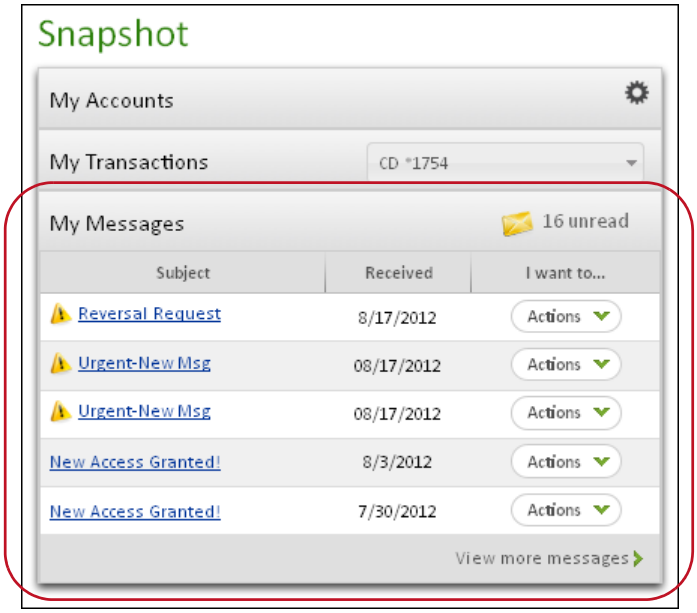
- Date
- Description
- Amount

Use the list in the My Transactions module header to select a different account to view recent transactions from. (The accounts available are those selected in the My Accounts module.)

When you need to see all your transactions, or access more detail than is presented here, click the **View more transactions link** in the lower right corner of the module. You go to the Account Detail page of the Accounts tab (refer to Account Detail in chapter 4 for details).

Using the My Messages Module

Click the **My Messages** module to see your 5 most recent unread messages.

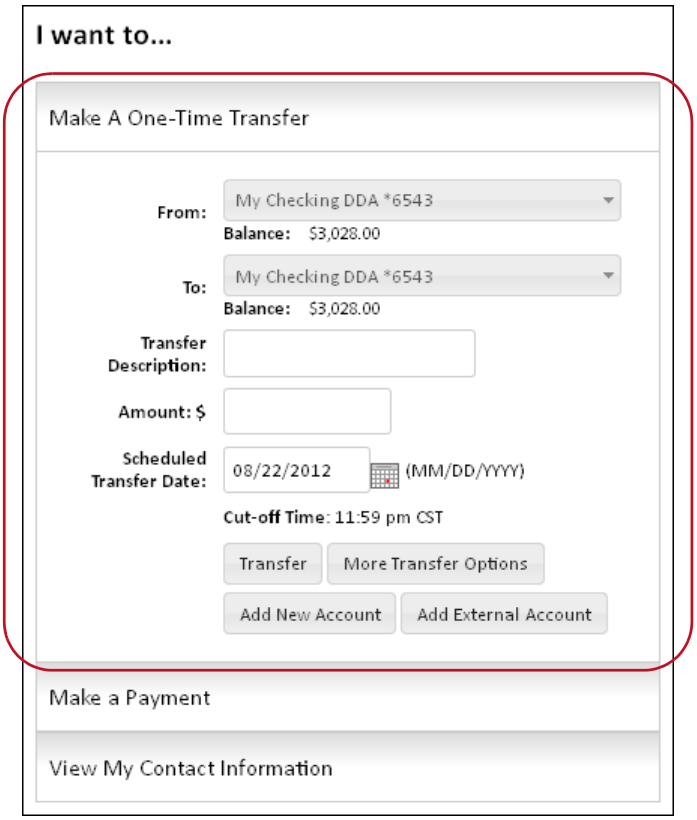


For each message, you see the message subject and the date the message was received. You can click the Subject link to view the message, or use the **Actions** menu to view, reply to, or delete the message. These actions all jump to the appropriate page of Messages tab.

The total number of unread messages is displayed in the module header. To see all your messages, click the **View more messages** link in the lower right corner of the module. You go to the All Messages page of the Messages tab (refer to Accessing the Messages Inbox in chapter 8 for details).

Using the Make a One-Time Transfer Module

You can make a simple funds transfer directly from the Snapshot tab. Click the **Make a One-Time Transfer** module to show the transfer fields.



Select the source and destination accounts for the transfer funds using the **From** and **To** lists, and enter an amount. The available balance of each account is displayed for reference directly below the account list. Negative balances are displayed in red. For external accounts, the applicable credit or debit limit is shown in place of a balance.

If the account you need is not shown, you need to add it to the accounts available for online access. Click **Add New Account** or **Add External Account** to go to the appropriate section under User Services, where you can add the account (refer to Adding a New Online Account or Entering an External Transfer Account Request in chapter 7 for details).

Enter a date for the transfer under **Scheduled Transfer Date** and click **Transfer**. If you decide you want to make a recurring transfer instead, click **More Transfer Options** to go to the Transfers tab (refer to Scheduling a New Transfer in chapter 5 for details).

Using the Make a Payment Module

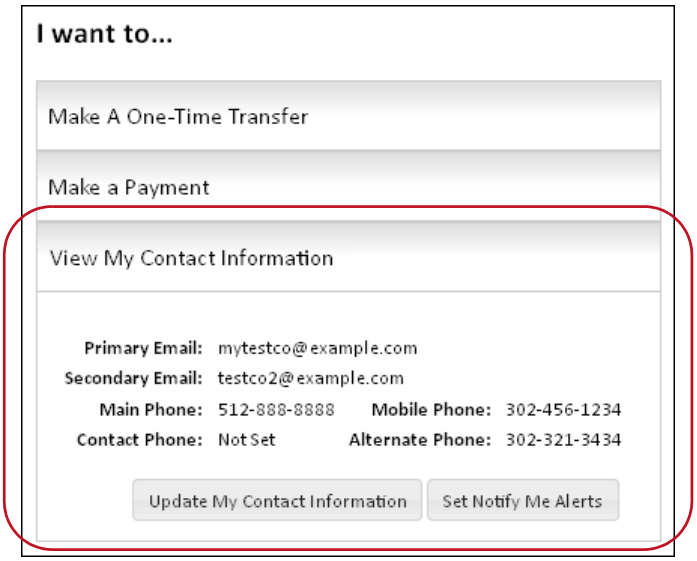
If you have online Bill Pay service, you can make a payment to one of your registered payees directly from the Snapshot tab. Click the **Make a Payment** module to show the payment fields.

> **Note**
>
> Similar to the Payments tab, users who do not have Bill Pay service see only a link to request the service in this module.

Depending on your payments options, you will be directed to the Payments tab or can see your 5 current pending payments.

Using the View My Contact Information Module

Click the **View My Contact Information** module header when you need to quickly verify your email addresses and phone number on file with your financial institution.



Your primary email address is listed, along with your secondary email address and phone numbers.

If any information is incorrect, click **Update My Contact Information** to jump to the Change Contact Information page in User Services (refer to Changing Your Contact Information in chapter 7 for details). To jump to the Notify Me Alerts page, click **Set Up Notify Me Alerts** (refer to chapter 6 for details).