



CFCU Digital Banking Updates:

August 2023

This guide includes highlights of upcoming changes comparisons between the old and new looks of CFCU Digital Banking.

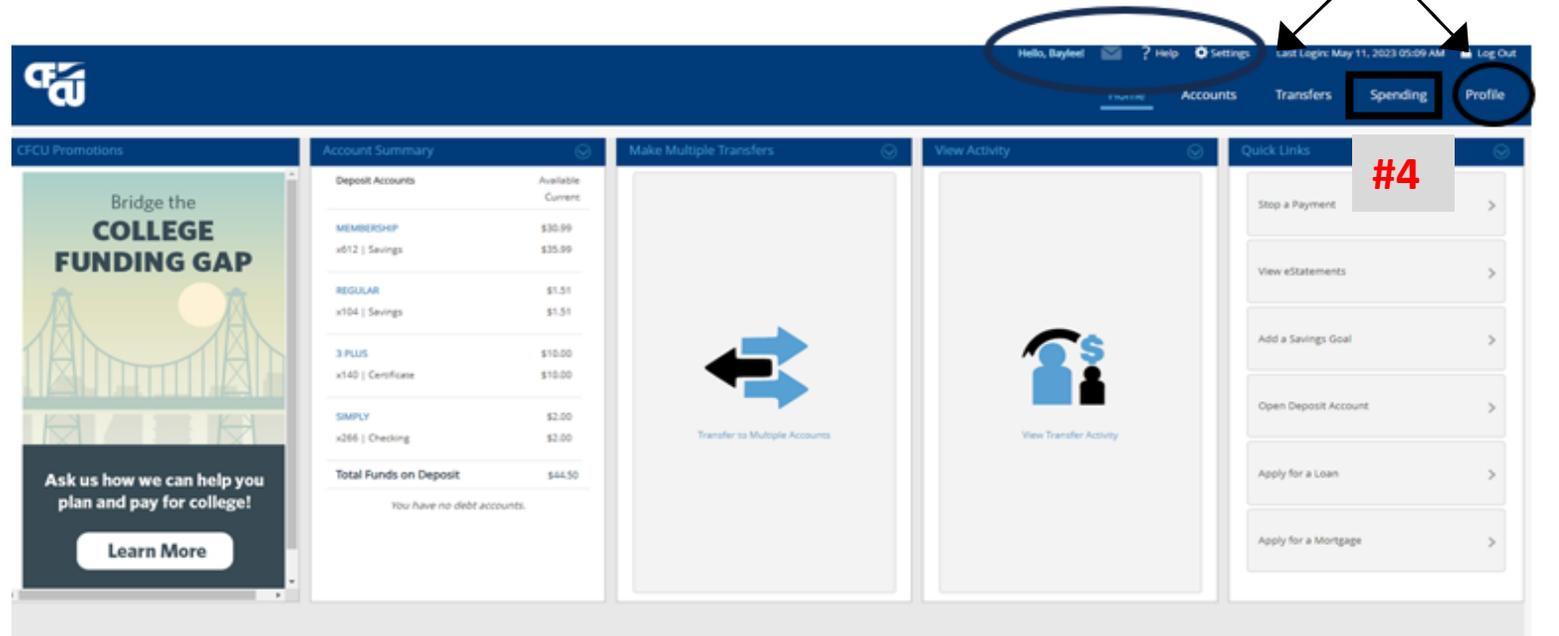
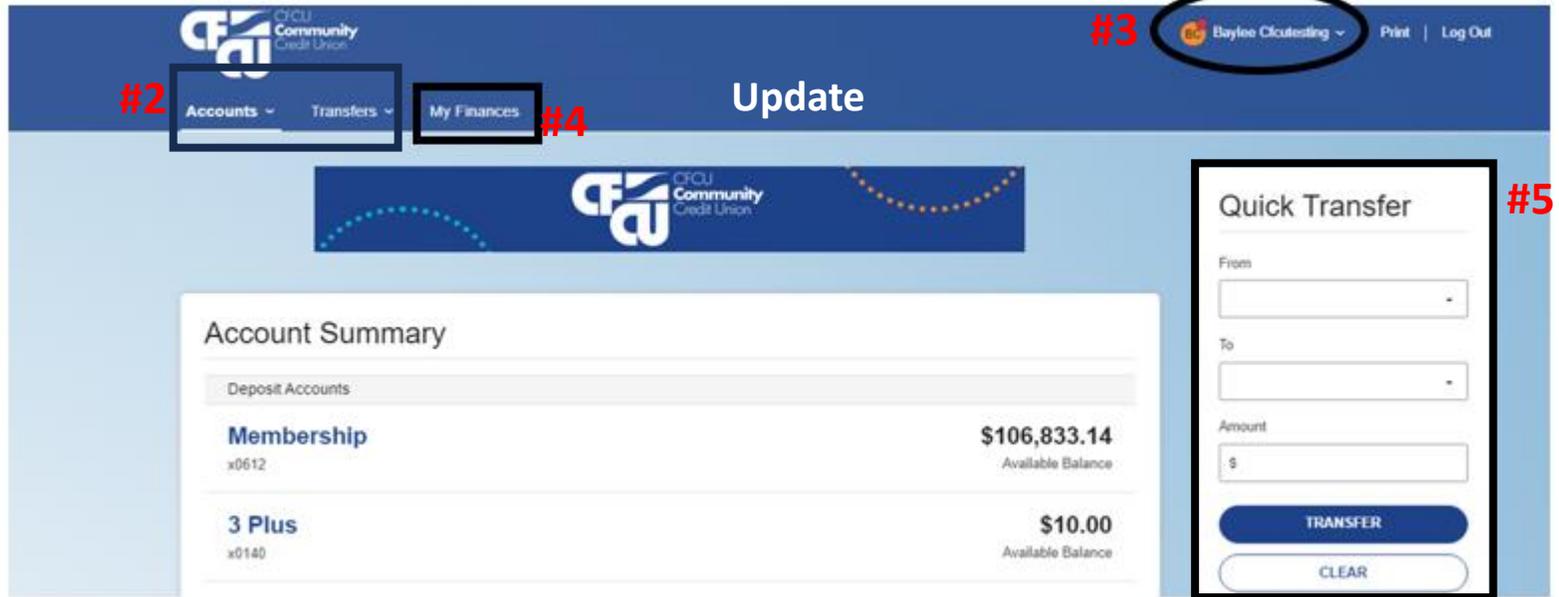


Home Screen Comparison:

Top Image is for the updated screen that will launch on 8/08/2023.

Bottom Image is the current screen.

1. Landing page is reduced to the 2 most used functions; Account Summary and Quick Transfers.
 - The update does not permit customizing these functions, unlike the old page where you could choose what you wanted on the main screen.
2. There is no Home option listed:
 - Click the CFCU Logo or Accounts-> Account Summary from any screen to return to this screen
3. Click your name to access Messages, Profile, and Settings
 - The red dot by your initials indicates you have new messages
4. Spending is now My Finances and will have additional features in the updated
5. Quick Transfers lets you complete immediate one-time transfers in just 2 steps
 - To create recurring transfer, scheduled future dated transfers and/or add memos to your transfers **Use Transfers->Make a Transfer**

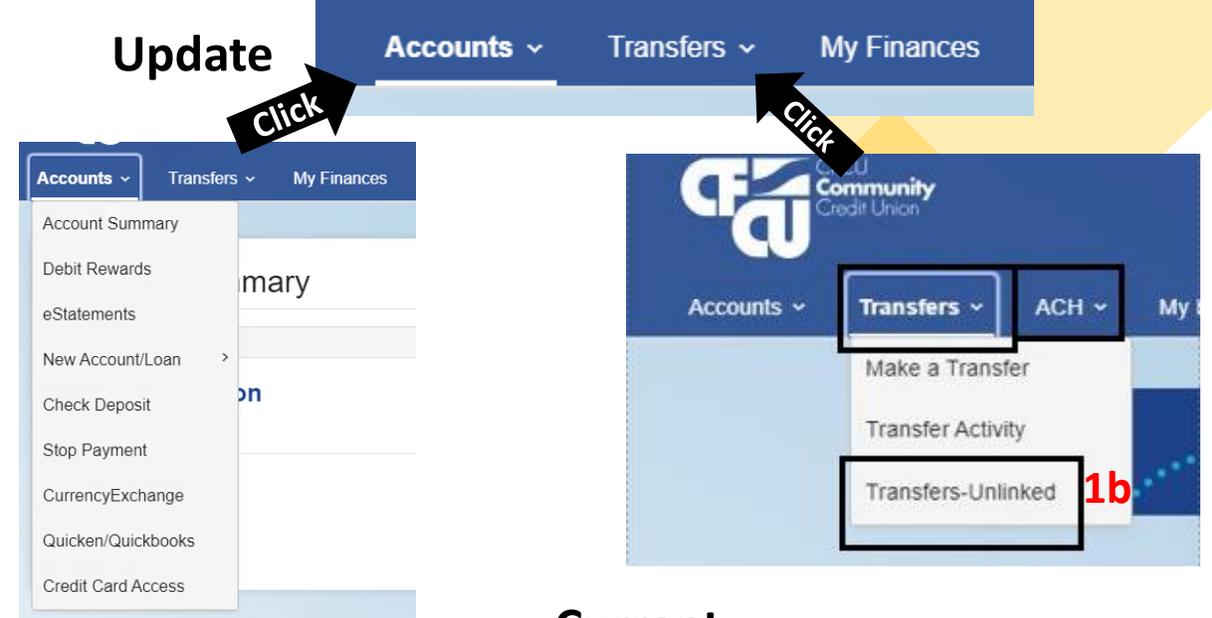


Menu Option Overview

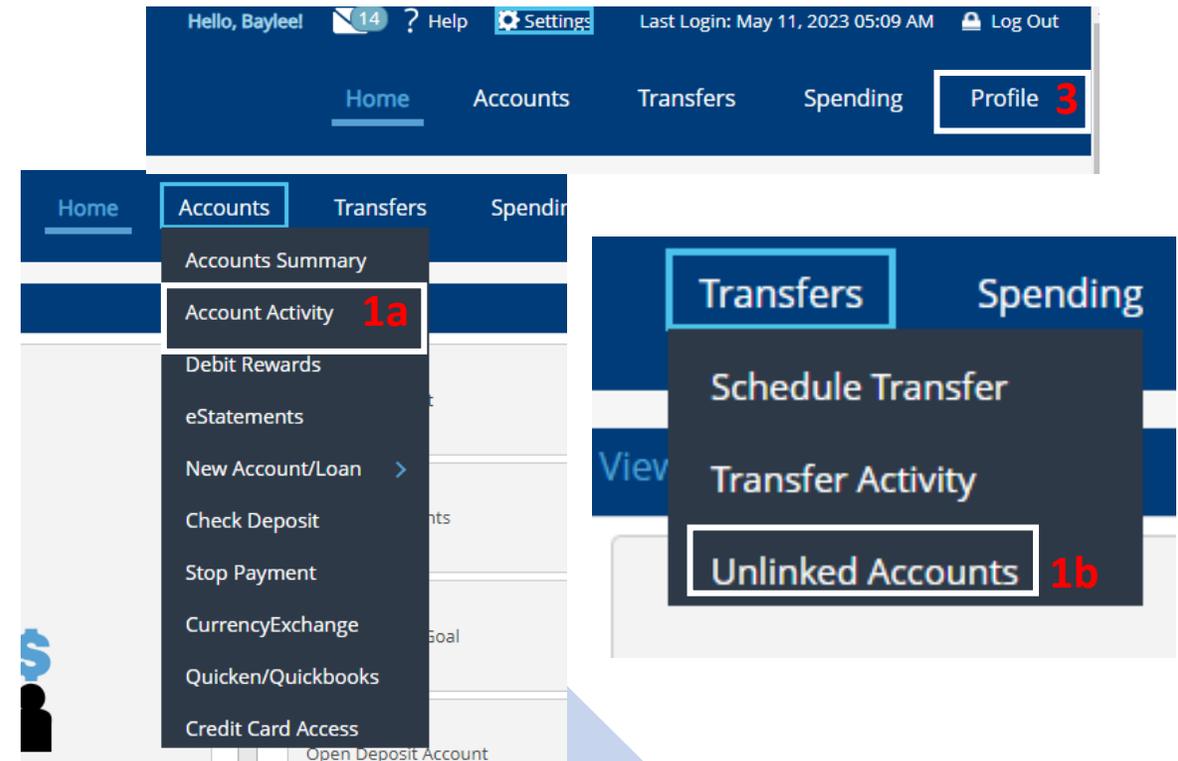
Top Image is for the updated screen that will launch on 8/08/2023.

Bottom Image is the current screen.

1. Accounts selection has remained the same along with the Transfers selection.
 - a) Account activity will now display automatically when you select an account
 - b) Unlinked accounts is now listed under "Transfers-Unlinked."
 - c) Click the desired menu to view the selections listed under them.
2. Profile settings will no longer show on the menu options
3. The location on the menu options will be on the Left of the screen under the CFCU Logo rather than to the right under the profile information.



Current

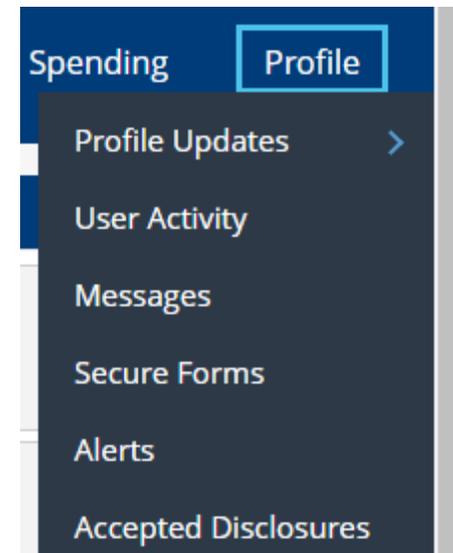
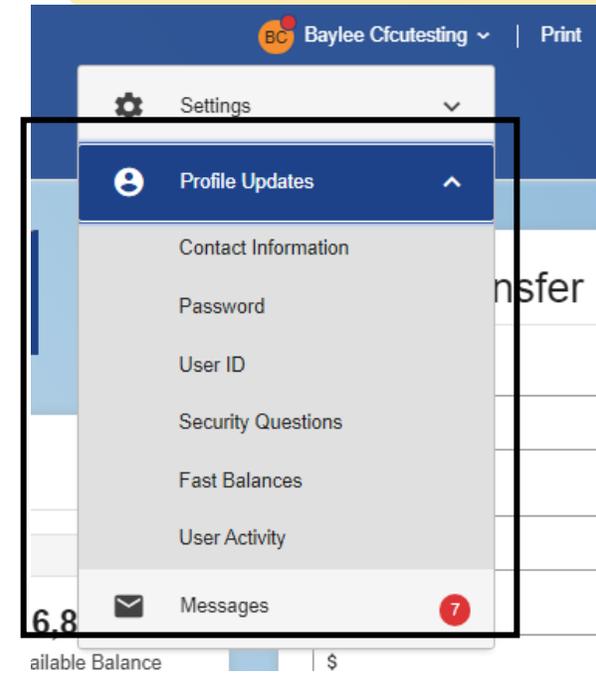
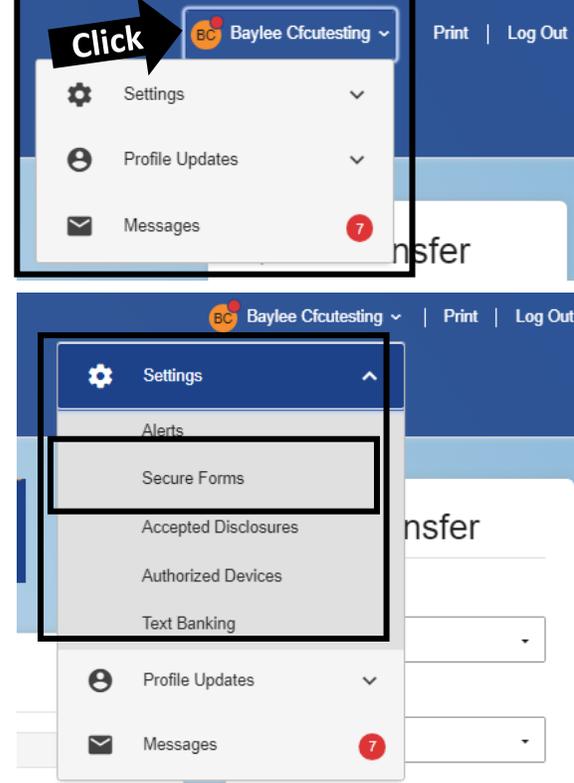


Profile Settings & Menu

Top Image is for the updated screen that will launch on 8/08/2023.

Bottom Image is the current screen.

1. The menu for profile settings is now listed once you click the arrow by your name on the top right side of the screen.
 - a) Previously, profile settings was an option on the main menu.
2. Secure forms is now listed under the settings, it will no longer be its own menu option.
3. Messages is now a menu under the profile updates option, it is no longer an envelope on the top of the website.
 - a. The Messages option will be found at the bottom of the drop box.

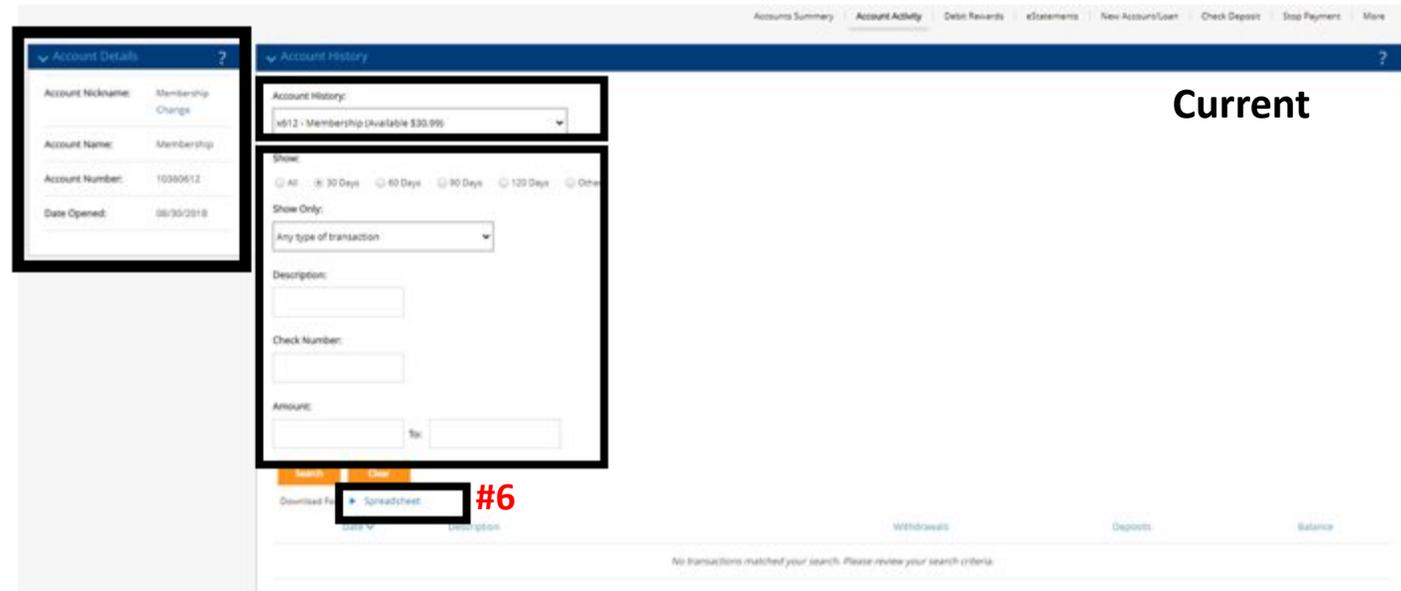
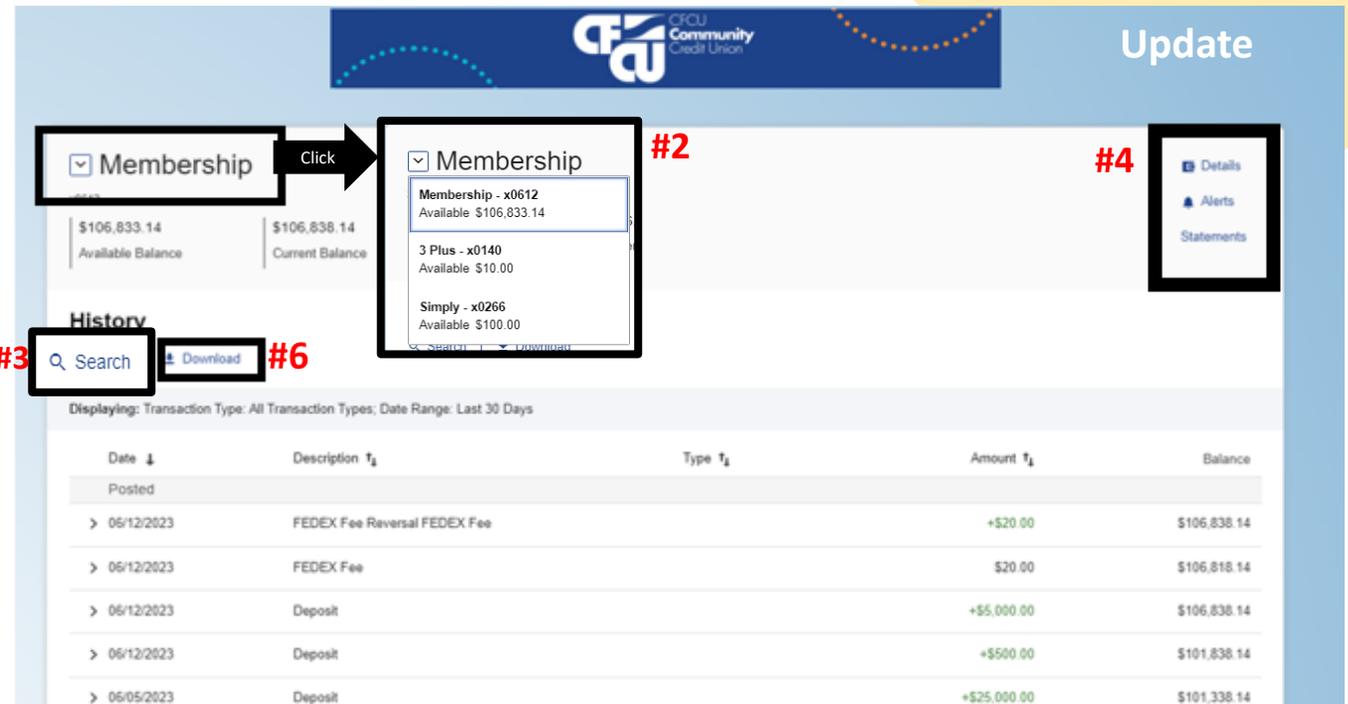


Viewing Transaction History:

Top Image is for the updated screen that will launch on 8/08/2023.

Bottom Image is the current screen.

- From Account Summary, click an account you would like to view
 - Default view will be last 30 days
- Click down arrow next to account name to toggle between accounts
- Click search to change date range
- Quick links on the right for Account Details, Alerts and Statements
- To see check images, click "View Check" in the transaction details.
- Download CSV spreadsheets
 - Use Accounts->Quicken/Quickbooks to download QBO or QFX file types



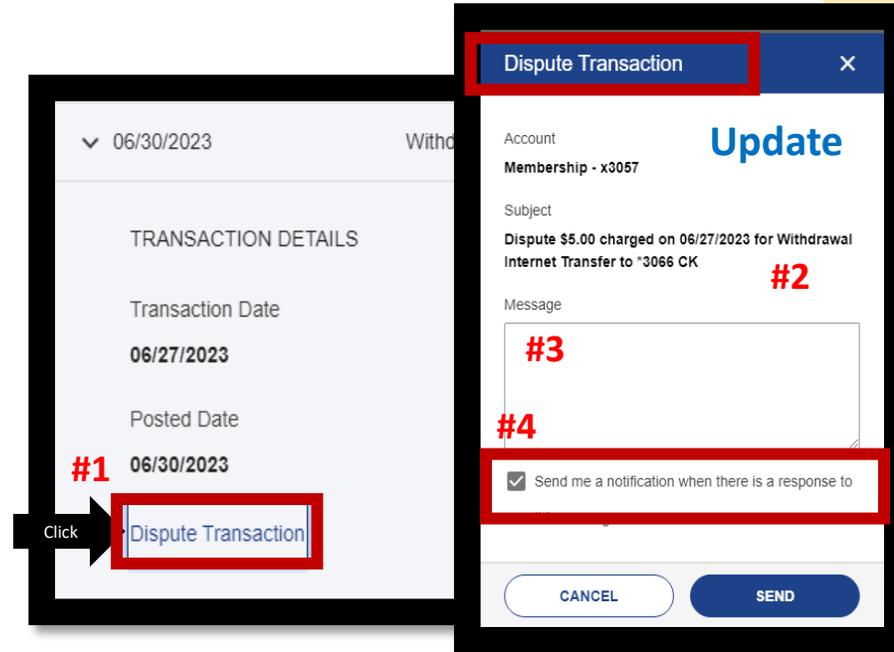
Disputing a Transaction:

Top Image is for the updated screen that will launch on 8/08/2023.

Bottom Image is the current screen.

Clicking on Dispute a Transaction will open a quick pop-up form for the member to complete. This form is treated like a secure message as they are in the current Digital Banking, just a simpler way for the member to submit the details.

- #1 Much clearer description “Dispute Transaction” vs the current  symbol.
- #2 No need to select a category or account.
- #3 Just click Dispute a transaction – type a quick message and hit Send!
- #4 Member can chose to get an alert when replies are sent



Withdrawals	Deposits	Balance
	\$15.00	\$23.30 

Transaction Inquiry

Category — Select a Category — Current

Status New

Account (if applicable):

Subject Transaction Inquiry for transaction Dep Stacy's Lunch

Message

> Please type in your question regarding transaction 'Dep Stacy's Lunch' on account x017 - 07/20/2023 - \$15.00

My Finances Overview

Top Image and lower left image are for the updated screens that will launch on 8/08/2023.

Bottom right image is the current screen.

1. My Finances will replace the Spending tool for budgeting, goals and other financial management.
 - My Finances will open in a pop-up window
 - You will be prompted to enter your digital banking user ID and password at your first log in
2. New Analysis and Investment tracking options
 - Analysis helps you identify earning and spending patterns
3. Improved Transaction Categorization
 - Easily create custom categories to track
4. New budget recommendation options or create your own personalized budgets
 - Budgets created in the Spending tool will not carry over.
5. Create and track savings goals
 - Goals created in the Spending tool will not carryover.

#1

#2

#2

#4

#3

#5

#1