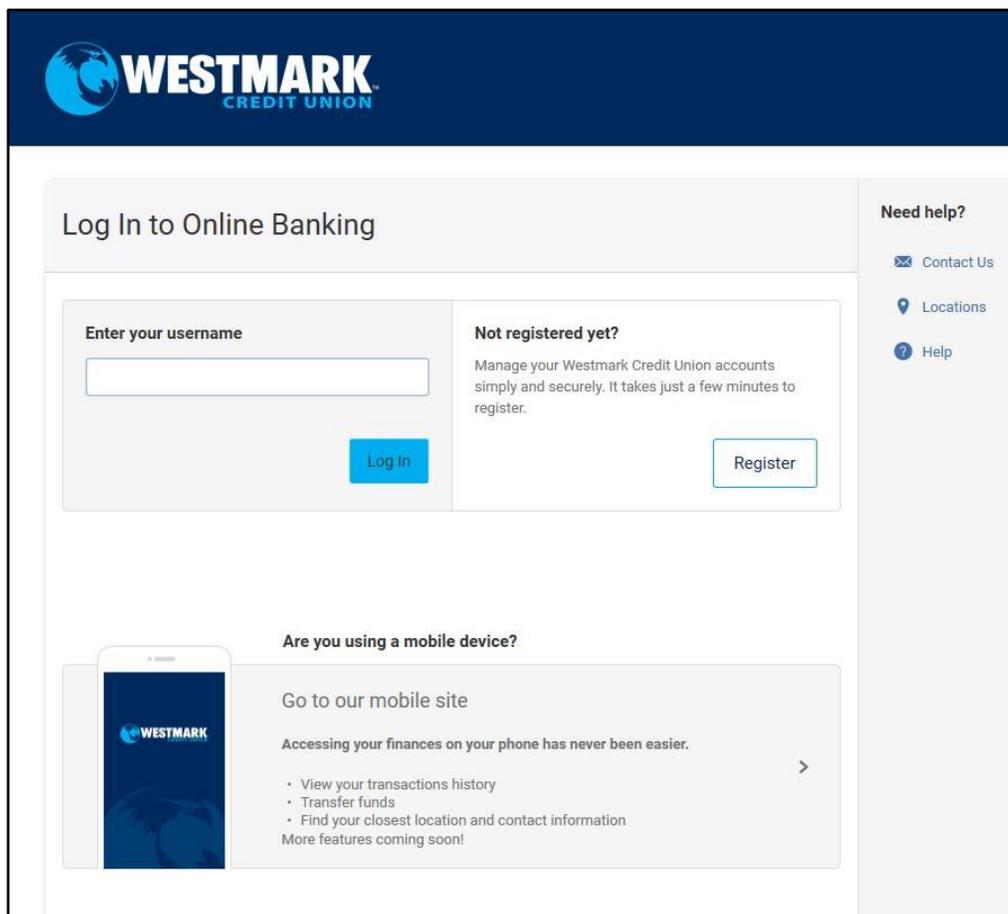




## New Online Banking System Quick Guide

Go Live Date:  
May 27<sup>th</sup> 2020

### Initial Login Screen:



This is the initial login screen. There will be two options, “Log In” or “Register” as pictured above. The “Log In” option will be used if you already have online banking set-up through our old online banking system. The “Register” option will be used to set-up online banking for the first time.

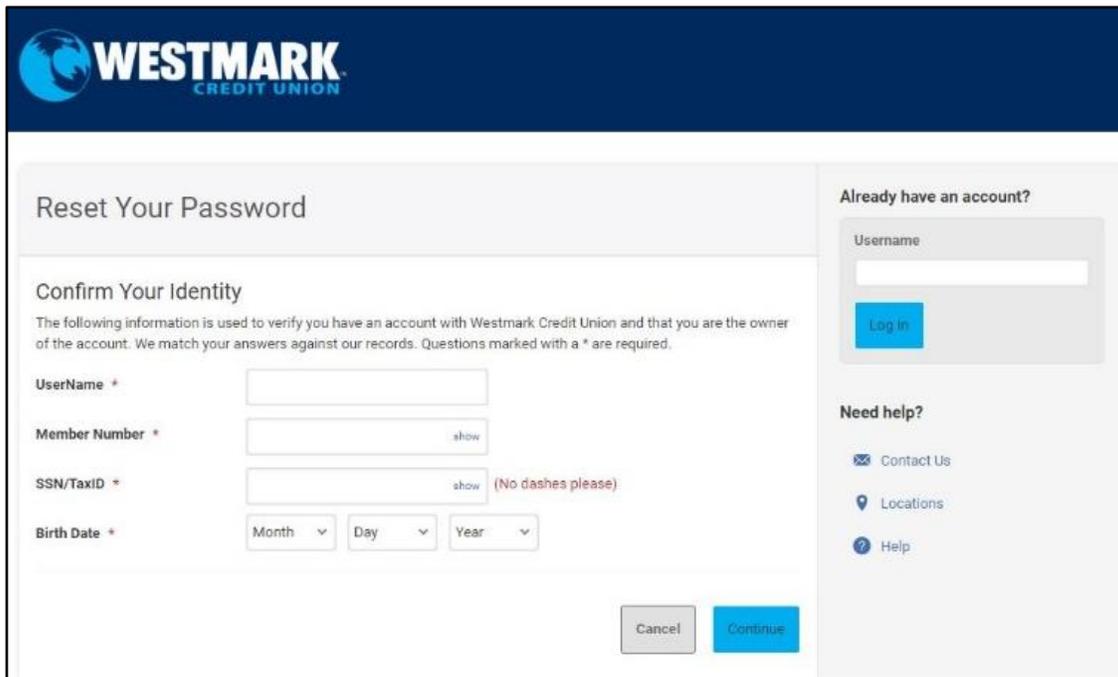
## Login Option:

The “Log In” option is for you if you already have online banking set up through the old online banking system. First, enter your username. What is my user ID for logging in? Any user ID that is currently used in the old online banking system can be used as the username to access the new online banking system. Upon your first login, you will be prompted to retrieve a temporary password to proceed. After clicking the temporary password link, you will be presented with the online banking disclosure. You will be asked to accept this disclosure, then verify your banking information. Once you’ve done both of those steps, you will be asked to select how you’d like to receive the temporary password. The options available to you will depend on what contact information you have on file with Westmark Credit Union. Once you’ve received the secure message with your temporary password, use your current online banking username and the provided temporary password to complete the initial log in process. Upon log in, you will be asked to update your password to a permanent password and set up your security questions. What is the new password criteria? A minimum of 8 characters: 1 uppercase, 1 lowercase, 1 number, and a special character must be used. You will also be prompted by the system as to what the criteria is. Follow the screenshots below for the full process.

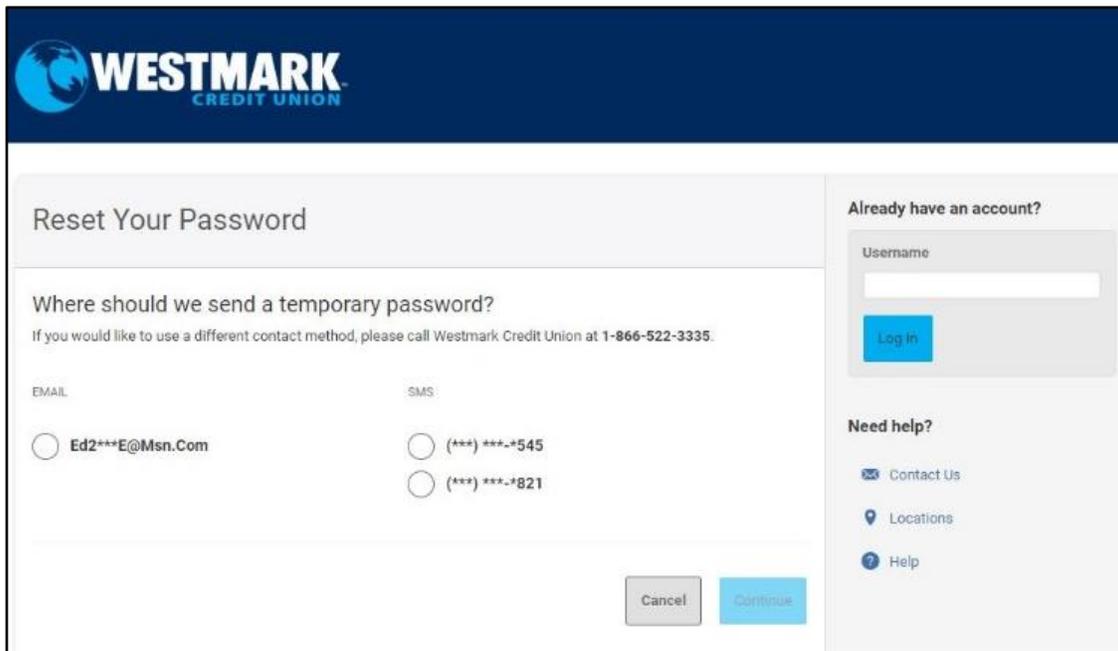
1.

2.

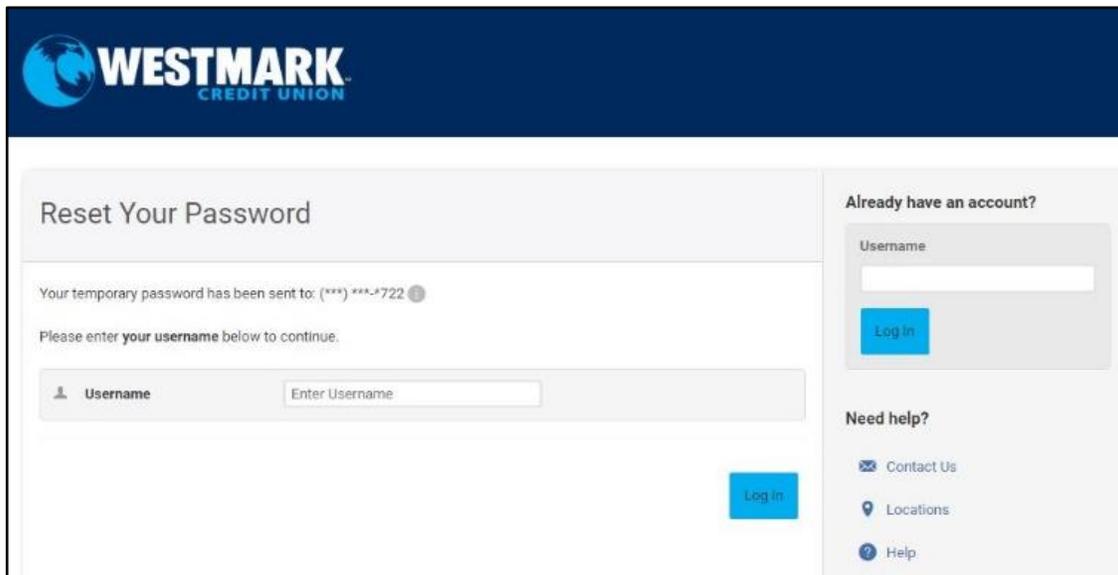
3.



4.



5.



6.



## Log In to Online Banking

### Temporary Password

If you are an existing home banking user and you have NOT received an email containing a temporary password, please enter your current home banking password below.

If you are registering for the first time, it may take up to 5 minutes to receive your temporary password and it will expire 24 hours after it has been sent. If you received your temporary password, please enter it below.

Password

[Reset Password](#)

**Log In**

**Need help?**

- Contact Us
- Locations

7.



## Log In to Online Banking

### Password Change

Please set a new password to continue with the registration process. Your password must be at least eight characters in length, contain at least one lowercase letter, at least one uppercase letter, at least one special character, and at least one number.

New Password

Confirm Password

**Continue**

**Need help?**

- Contact Us
- Locations

8.



## Log In to Online Banking

Either we don't recognize your username or we don't recognize this device.

Username **TestAcct** [Not TestAcct?](#)

Questions **Text**

Please answer the question below so we can verify your identity.

What is the middle name of your youngest child?

Don't recognize this question?

Device Security  Remember Me On This Device

**Continue**

Congratulations, you have completed your initial login. At this point you are ready to move around in the new online banking system.

The screenshot displays the Westmark Credit Union online banking interface. At the top, the Westmark Credit Union logo is on the left, and the user's name 'JOE MEMBER BUSINESS TEST INC' with a dropdown arrow is on the right. The main content area is titled 'Log In to Online Banking'. Below this title is a 'Get Started with Online Banking' section containing three cards: 'Complete Profile' (Add your photo and other personal info to your profile), 'View Accounts' (View your accounts and balances), and 'Customize Settings' (Customize your online banking experience with your favorite theme). To the right of the main content is a 'Your Progress' sidebar with a vertical progress indicator. The progress steps are: 'Confirm Your Identity' (Verify you have a Westmark Credit Union account and that you are the owner of the account), 'Register' (Choose a username and generate a temporary password), 'Authenticate' (Provide your security information), 'Confirm Contact Information' (Confirm your email and phone number), and 'Done!' (Start banking, saving, budgeting and sharing). At the bottom of the sidebar is a 'Need help?' section with links for 'Contact Us' and 'Locations'. On the left side of the dashboard, there is a vertical navigation menu with icons for 'DASHBOARD', 'ACCOUNTS', 'TRANSFERS', 'BILL PAY', and 'MORE...'.

## Register Option:

The “Register” option will be used for new members wanting to set-up online banking for the first time. First, click on the “Register” button. You will be prompted to read and acknowledge the disclosure for online banking. Click the “I agree” box.

**WESTMARK CREDIT UNION**

### Register for Online Banking Access

Manage your Westmark Credit Union accounts simply and securely, any time and anywhere you have internet access. It takes just a few minutes to register.

Please accept the disclosure to continue the registration process.

Any waiver (express or implied) by either party or any default or breach of this Agreement must be in writing and shall not constitute a waiver of any other or subsequent default or breach. You may not assign this Agreement. This Agreement is binding upon your heirs and the Credit Union's successors and assigns. Certain of the obligations of the parties pursuant to this Agreement that by their nature would continue beyond the termination, cancellation, or expiration of this Agreement shall survive termination, cancellation, or expiration of this Agreement. This Agreement, together with the Membership and Account Agreement constitutes the entire agreement between you and the Credit Union with respect to the subject matter hereof and there is no understanding or agreements relative hereto which are not fully expressed herein.

The words "you", "your", and "yours" refer to the Westmark Credit Union member(s) jointly and severally. The words "we", "us", "our", "Westmark Credit Union" and "Credit Union" refer to Westmark Credit Union. This Agreement and Disclosure Statement (hereinafter "Agreement") explains and describes the types of Electronic Funds Transfers which are available to you with our Online Banking system. This Agreement also contains your rights and responsibilities concerning transactions that you make through the Online Banking, including your rights under the Electronic Funds Transfer Act.

To qualify for access to the Online Banking, you must be a Credit Union member. The Online Banking may not be accessible to Business and Organizational accounts. Other conditions may apply.

**ENROLLING FOR ONLINE BANKING**

The member account number, PIN, and Address Number are required for initial enrollment to Online Banking.

- Users will create a Logon ID and Security Code.
- Logon IDs can be between 6 and 50 alpha numeric characters.
- Security Codes can be between 8 and 16 alpha numeric characters. A minimum of 1 numeric, 1 symbol and 6 alpha characters is required.
- You accept responsibility for periodically changing your Logon ID and protecting the integrity of the Logon ID to protect unauthorized transactions and account access.

I Agree

Cancel Continue

**Already have an account?**

Username

Log In

**Need help?**

- Contact Us
- Locations
- Help

The next screen will have you confirm your identity. You will be asked to fill in the required fields: Member Number, SSN/Tax ID, Birth Date, Email, and optional the Zip Code.

**WESTMARK CREDIT UNION**

### Register for Online Banking Access

#### Confirm Your Identity

The following information is used to verify you have an account with Westmark Credit Union and that you are the owner of the account. We match your answers against our records. Questions marked with a \* are required.

Member Number \*  show

SSN/TaxID \*  show (No dashes please)

Birth Date \* Month  Day  Year

Email

optional

Zip Code

Cancel Continue

**Application Process**

- Confirm Your Identity  
Verify you have a Westmark Credit Union account and that you are the owner of the account.
- Register  
Choose a username and generate a temporary password.
- Authenticate  
Provide your security information.
- Confirm Contact Information  
Confirm your email and phone number.
- Done  
Start banking, saving, budgeting and sharing.

**Need help?**

Contact Us

Then you will be prompted to input a username and select where you would like the temporary password to go.

The screenshot shows the 'Register for Online Banking Access' page. At the top left is the Westmark Credit Union logo. The main heading is 'Register for Online Banking Access'. On the right side, there is an 'Application Process' progress bar with five steps: 'Confirm Your Identity', 'Register', 'Authenticate', 'Confirm Contact Information', and 'Done'. The 'Register' step is currently active, indicated by a green dot and a vertical line. Below the progress bar, there is a 'Need help?' section with a 'Contact Us' link.

The main content area is divided into two sections. The first section is for 'Username'. It includes a text input field containing 'TestAcct' and a 'Check Availability' button. The second section is for 'Password'. It includes a text input field and a list of radio button options for where to send the temporary password: 'SMS', '(\*\*\*)\*\_\*\_\*111', '(\*\*\*)\*\_\*\_\*222', '(\*\*\*)\*\_\*\_\*333', and 'Other'. The 'SMS' option is selected. At the bottom right of the form are 'Cancel' and 'Continue' buttons.

A temporary password will be sent to the option that you selected above. Enter the temporary password in the field and click "Log In".

The screenshot shows the 'Register for Online Banking Access' page, now at the 'Temporary Password' step. The 'Application Process' progress bar on the right shows that the 'Register' step is complete (green dot) and the 'Authenticate' step is active (green dot and vertical line). The 'Temporary Password' section includes a text input field and a 'Reset Password' link. Below the input field is a 'Log In' button. The 'Need help?' section with the 'Contact Us' link is also visible at the bottom right.

After logging in, you will be required to update the password and set up security questions and answers. What is the new password criteria? A minimum of 8 characters: 1 uppercase, 1 lowercase, 1 number, and a special character must be used. You will also be prompted by the system as to what the criteria is.

**WESTMARK**  
CREDIT UNION

### Log In to Online Banking

#### Password Change

Please set a new password to continue with the registration process. Your password must be at least eight characters in length, contain at least one lowercase letter, at least one uppercase letter, at least one special character, and at least one number.

**New Password**

.....

Strong

**Confirm Password**

.....

Continue

**WESTMARK**  
CREDIT UNION

### Log In to Online Banking

Either we don't recognize your username or we don't recognize this device.

Username TestAcct Not TestAcct?

Questions Text

Please answer the question below so we can verify your identity.

What is the middle name of your youngest child?

Answer

Don't recognize this question?

Device Security  Remember Me On This Device

Continue

Congratulations, you have completed your initial login. You will be prompted to enter and confirm your personal information, such as: email address, phone number, and select the Time Zone. At this point you are ready to move around in the new online banking system.

**WESTMARK**  
CREDIT UNION

### Log In to Online Banking

DASHBOARD

BILL PAY

MORE...

**Email**

**Phone Number**

Home

**Time Zone**

(UTC-07:00) Mountain Time (US...)

Cancel Continue

#### Your Progress

- Confirm Your Identity  
Verify you have a Westmark Credit Union account and that you are the owner of the account.
- Register  
Choose a username and generate a temporary password.
- Authenticate  
Provide your security information
- Confirm Contact Information  
Confirm your email and phone number.
- Done!

## The Dashboard:

When logging into the new online banking system, the first screen that will appear is the “Dashboard”. This is your initial landing page within online banking. Here you will find the most important and used information. There are “Widgets” to access: Accounts, Transfers, Bill Pay, and more. You will also get a summary of your accounts, have access to additional “Widgets” and “Settings” and there are helpful “Quick Links” at the bottom of the “Dashboard”.

The screenshot shows the Westmark Credit Union online banking dashboard. The header includes the Westmark logo and the user name 'JOE MEMBER BUSINESS TEST INC'. The dashboard is organized into several sections:

- Accounts:** A table listing various accounts with their current balances and options to view details or make payments.
- Credit Score:** A widget showing an average credit score of 687 and options to track, monitor, or find better loan options.
- Financial Resources & Education:** A section with a tutorial on Individual Retirement Accounts, dated August 23, 2012.
- Next 14 days:** A section indicating no activity is scheduled for the next 14 days.
- Quick Links:** A list of links for the Westmark Website, Apply for a Loan, and Lost or Stolen Card.

Account Type	Account Name	Account ID	Balance	Options
Checking	REGULAR CHECKING A...	****1120	\$15,000.00	View Details
	VISA HOME EQUITY	****1128	\$0.00	View Details
Savings	PRIMARY SAVINGS ACCT	****1100	\$22,804.90	View Details
	SECOND SAVINGS ACCT	****1102	\$100.00	View Details
Loans	ADVANCE LINE	****1100	\$0.00	Pay \$500.00
	ADVANCE LINE	****1101	\$0.00	Pay \$0.00
	PERSONAL LOC	****1102	\$0.00	Pay \$0.00

## Account Widget:

What does the “Account Widget” do? It provides an at-a-glance view of all of your accounts. When you click on a specific account, you will get more details. The diagonal paper clip icon represents an account that the member is a joint owner on. How long will my transactions be available to view? Transaction history will be available to view for up to 3 years, this includes any checks written.

The screenshot displays a banking dashboard with a sidebar on the left containing navigation icons for Dashboard, Accounts, Transfers, Card Management, Bill Pay, and More. The main content area is titled "Accounts" and has two tabs: "Accounts" (selected) and "Tax Information".

Under the "Accounts" tab, there is a list of "All Accounts":

- Checking: 2 accounts, \$15,000.00
- Eagle Checking: \*\*\*\*1120, \$15,000.00
- Prime 55: \*\*\*\*1128, \$0.00
- Savings: 2 accounts, \$22,904.90
  - PRIMARY SAVINGS ACCT: \*\*\*\*1100, \$22,804.90
  - SECOND SAVINGS ACCT: \*\*\*\*1102, \$100.00
- Loans: 27 accounts, \$0.00
  - ADVANCE LINE: \*\*\*\*1100, \$0.00
  - ADVANCE LINE: \*\*\*\*1101, \$0.00

The "Eagle Checking" account is selected, showing its details: Available Balance \$15,000.00 and Current Balance \$15,000.00. Below this, there are tabs for "Transactions", "Account Details", and "Analytics". The "Transactions" tab is active, featuring a search bar, a sort dropdown set to "Default", and up/down arrow icons.

The transaction history table is as follows:

DATE	DESCRIPTION	DEBITS	CREDITS	BALANCE
AUG 1 2019	From Share ****029-00 #FS00 <a href="#">Add a category</a>		\$20.00	\$100.00
AUG 1 2019	From Share ****029-00 #FS00 <a href="#">Add a category</a>		\$20.00	\$80.00
AUG 1 2019	From Share ****029-00 #FS00 <a href="#">Add a category</a>		\$20.00	\$60.00
AUG 1 2019	From Share ****029-00 #FS00 <a href="#">Add a category</a>		\$20.00	\$40.00
AUG 1 2019	From Share ****029-00 #FS00 <a href="#">Add a category</a>		\$20.00	\$20.00

## Transfer Widget:

How do I do a Transfer? Click on the “Transfer Widget” on the left-hand side bar. 4 Tabs will appear; Quick Transfer, Classic Transfer, Scheduled Tab, and History.

### Quick Transfer:

What is a “Quick Transfer”? The “Quick Transfer Widget”, allows for an easy transfer between previously set up accounts. This can only be used to conduct transfers for same day. To complete a “Quick Transfer”, members will need to select an account where the funds will be taken from, select or enter an amount, and select the account where the funds will be deposited.

The screenshot shows the 'Transfers' widget with the 'Quick Transfer' tab selected. The interface includes a sidebar with navigation options like Dashboard, Accounts, Transfers, Card Management, and Bill Pay. The main area displays a grid of account options for both 'From' and 'To' categories. The 'From' column lists accounts such as Eagle Checking (\$14,830.00), Prime 55 (\$110.00), and PRIMARY SAVING... (\$22,859.90). The 'To' column lists accounts like Eagle Checking (\$14,830.00), Prime 55 (\$110.00), and PRIMARY SAVINGS... (\$22,864.90). A central 'Amount' column allows selection of preset amounts (e.g., \$20, \$40, \$50, \$60, \$80, \$100, \$200, \$300, \$400, \$500, \$1,000, \$2,000, \$3,000, \$4,000, \$5,000) or a 'Custom Amount' field. The 'Submit Transfer' button is highlighted at the bottom right.

The 'Confirm Transfer' dialog box displays the following details: Transfer Amount: \$20.00; Transfer From: Eagle Checking \*\*\*\*1120; Transfer To: PRIMARY SAVINGS ACCT \*\*\*\*1100; Transfer Date: 16 OCT 2019; Frequency: One Time. The dialog includes a 'Cancel' button and a 'Confirm Transfer' button.

The 'Success' dialog box features a green checkmark icon and the text: 'Success Your transfer of \$20.00 has been completed.' The transfer details are repeated: Transfer From: Eagle Checking \*\*\*\*1120; Transfer To: PRIMARY SAVINGS ACCT \*\*\*\*1100; Transfer Date: 16 OCT 2019; Frequency: One Time. The dialog includes a 'Make Another Transfer' button and a 'Go to Transfer Activity' button.

## Classic Transfer:

What is a “Classic Transfer”? This type of transfer offers more options and allows you to schedule recurring transfers. Please take note of what your current recurring/scheduled transfers/loan payments are because you will want to verify that they are scheduled in the new online banking system. To complete a “Classic Transfer”, click on the tab that says “Classic Transfer”. Select where the funds will be taken from, select the account where the funds will be deposited into, select or enter an amount, choose the date when you would like the transfer to begin, choose the frequency, and choose an end date. Then click “Submit Transfer”. You will receive confirmation and then click “Confirm Transfer”.

Date	From Account	Amount
OCT 16	Eagle Checking ***1120	\$20.00
OCT 16	PRIMARY SAVI... ***1100	\$20.00
	Eagle Checking ***1120	\$20.00
	Prime 55 ***1128	\$20.00
	Eagle Checking ***1120	\$20.00
	PRIMARY SAVI... ***1100	\$20.00
	Eagle Checking ***1120	\$20.00
	Prime 55 ***1128	\$50.00

Transfer Amount	\$20.00
Transfer From	Eagle Checking ***1120
Transfer To	PRIMARY SAVINGS ACCT ***1100
Transfer Date	23 OCT 2019
Frequency	Every 2 Weeks
Ending Date	Never

## Scheduled Tab:

What does the “Scheduled Tab” do? This will show a confirmation of upcoming transfers. You will be able to see the date and specifics of transfers that are scheduled to take place.

The screenshot shows the 'Scheduled' tab in the 'Transfers' section. The interface includes a sidebar with navigation options: DASHBOARD, ACCOUNTS, TRANSFERS (selected), CARD MANAGEMENT, BILL PAY, and MORE... The main content area is titled 'My Scheduled Transfers' and features a calendar view for October, November, and December 2019. Below the calendar is a table of scheduled transfers.

DATE	AMOUNT	FROM	TO	STATUS
OCT 17 2019	\$50.00	Eagle Checking ***1120	Prime 55 ***1128	SCHEDULED
OCT 17 2019	\$20.00	Eagle Checking ***1120	SECOND SAVINGS ACCT ***1102	SCHEDULED
OCT 23 2019	\$20.00	Eagle Checking ***1120	Prime 55 ***1128	SCHEDULED

## History Tab:

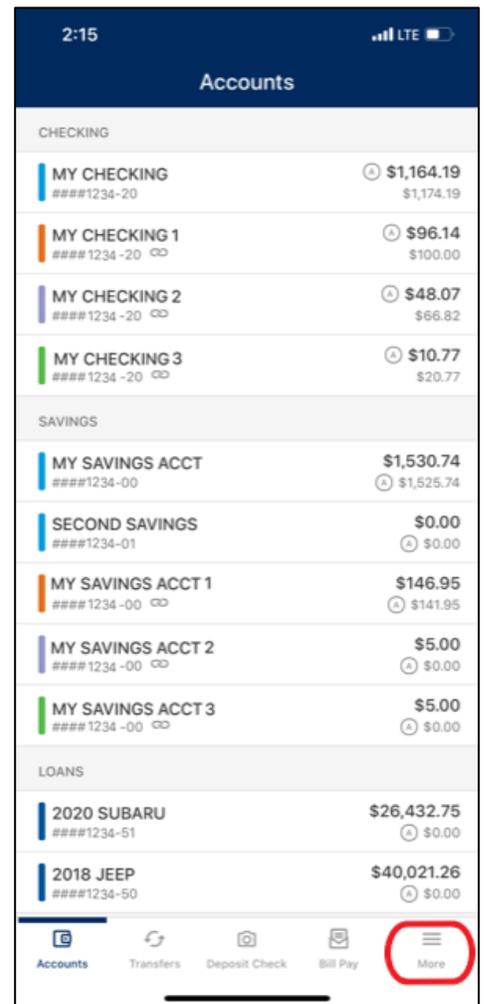
What does the “History Tab” do? This will give you a detailed transfer history.

The screenshot shows the 'History' tab in the 'Transfers' section. The interface includes the same sidebar as the previous screenshot. The main content area is titled 'My Transfer History' and features a list of completed transfers.

DATE	AMOUNT	FROM	TO	STATUS
OCT 16 2019	\$20.00	Eagle Checking ***1120	PRIMARY SAVINGS ACCT ***1100	SUCCEEDED
OCT 16 2019	\$20.00	Eagle Checking ***1120	Prime 55 ***1128	SUCCEEDED
OCT 16 2019	\$20.00	Eagle Checking ***1120	PRIMARY SAVINGS ACCT ***1100	SUCCEEDED
OCT 16 2019	\$50.00	Eagle Checking ***1120	Prime 55 ***1128	SUCCEEDED
OCT 16 2019	\$20.00	Eagle Checking ***1120	PRIMARY SAVINGS ACCT ***1100	SUCCEEDED
OCT 16 2019	\$20.00	Eagle Checking ***1120	PRIMARY SAVINGS ACCT ***1100	SUCCEEDED

## Mobile App:

How do I access the Mobile App? You will need to download the new mobile app in your app store on your device. Once you have downloaded the app, click on the Westmark mobile app to launch. Enter your current username and password. Click “Login”. You are no longer required to log into a PC for the initial set up. If this is the member’s 1<sup>st</sup> time logging into the new online banking system, you will need to create the new password and security questions. The system will retrieve your accounts and redirect you to your dashboard. To view the extended version of your dashboard, click the “Navigation Menu”, from there you will see all options available for you. You are now ready to enjoy your mobile banking experience.



## Bill Pay Widget:

What does the “Bill Pay Widget” do? This online feature will remain the same, but look a little different with the conversion. You will access it from the “Bill Pay Widget”, which will take you into the Check Free/Bill Pay site.

The screenshot shows the Westmark Credit Union website interface. At the top left is the Westmark Credit Union logo. To the right of the logo is a user profile icon and a dropdown menu. Below the logo is a navigation sidebar with icons for Dashboard, Accounts, Transfers, Bill Pay, Check Services, and Card Rewards. The main content area is titled "Bill Pay" and contains the following text:

Pay your bills simply and securely, any time and anywhere you have internet access. It takes just a few minutes to register. Please accept the disclosure to continue the registration process.

### Westmark Credit Union BillPay

## TERMS OF SERVICE

Last updated August 10, 2015

#### GENERAL TERMS FOR EACH SERVICE

**1 Introduction.** This Terms of Service document (hereinafter "Agreement") is a contract between you and Westmark Credit Union (hereinafter "we" or "us") in connection with each service that is described in the rest of this Agreement that applies to services you use from us, as applicable (each, a "Service") offered through our online banking site or mobile applications (the "Site"). The Agreement consists of these General Terms for Each Service (referred to as "General Terms"), and each set of Terms that follows after the General Terms that applies to the specific Service you are using from us. This Agreement applies to your use of the Service and the portion of the Site through which the Service is offered.

**2 Service Providers.** We are offering you the Service through one or more Service Providers that we have engaged to render some or all of the Service to you on our behalf. However, notwithstanding that we have engaged such a Service Provider to render some or all of the Service to you, we are the sole party liable to you for any payments or transfers conducted using the Service and we are solely responsible to you and any third party to the extent any liability attaches in connection with the Service. You agree that we have the right under this Agreement to delegate to Service Providers all of the rights and performance obligations that we have under this Agreement, and that the Service Providers will be third party beneficiaries of this Agreement and will be entitled to all the rights and protections that this Agreement provides to us. Service Provider and certain other capitalized terms are defined in a "Definitions" Section at the end of the General Terms of this Agreement. Other defined terms are also present at the end of each set of Terms that follows after the General Terms, as applicable

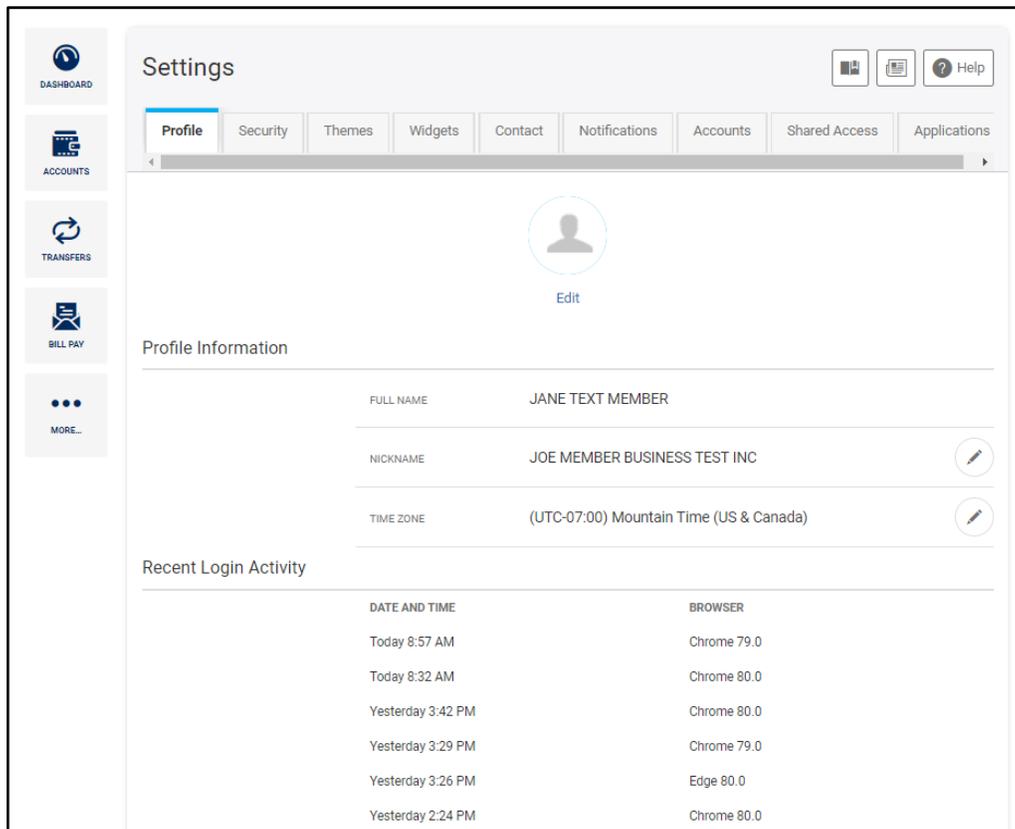
**3 Amendments.** We may amend this Agreement and any applicable fees and charges for the Service at any time by posting a revised version

I Agree \*

Continue

## Settings:

What can I do in Settings? 9 Tabs will appear: Profile, Security, Themes, Widgets, Contact, Notifications, Accounts, Shared Access, and Application. Below will explain what each Tab does.



What does the “Profile Tab” do? This confirms your identity and provides a log of recent activity.

What does the “Security Tab” do? It allows you to update security settings, and the two-factor authentication.

What does the “Themes Tab” do? It allows you to customize your online banking experience. The background can also be customized/changed.

What does the “Widgets Tab” do? It allows you to choose the Widgets that you would like to see displayed on the left-hand side bar. The default

Widgets that are displayed are: The Dashboard, Accounts, Transfers, E-Statements, and Bill Pay. To add a new Widget to your favorites, click the star. The system allows for 5 favorites to be shown on the “Dashboard” at a time. You can change the order of the Widgets by clicking “Reorder Favorites” and dragging the Widgets into the preferred order. Once done updating, scroll to the bottom and click “Save”.

What does the “Contact Tab” do? This allows you to update phone numbers, addresses, and email addresses.

What does the “Notification Tab” do? This allows you to set up email and text alerts. You will need to re-establish current alerts in the new online banking system.

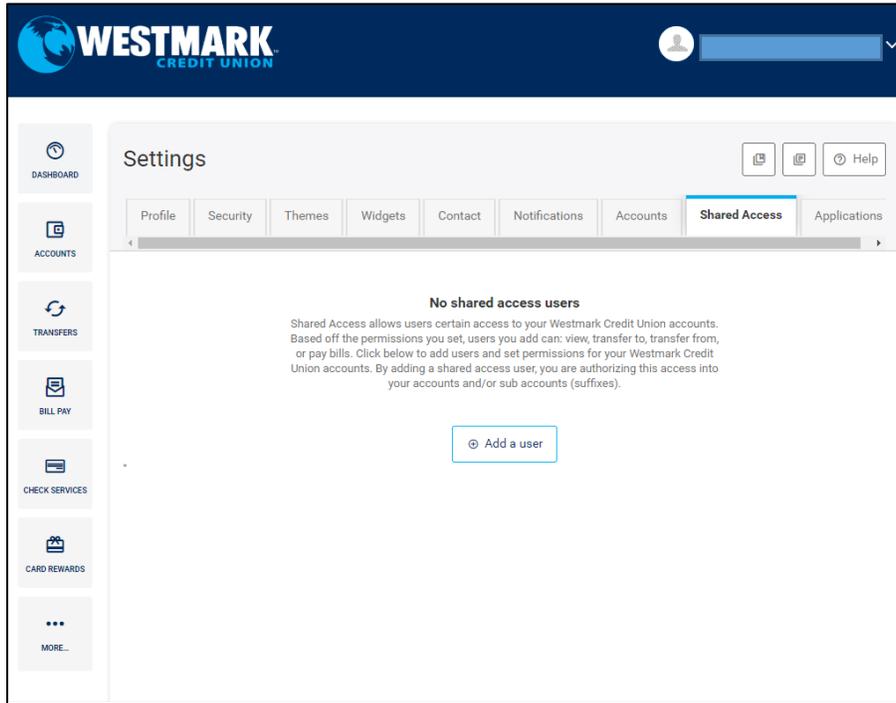
What type of notifications can be set for my Accounts? The following alerts are available as notifications for Accounts: Automatic Deposit, Automatic Withdrawal, Balance, Balance Summary, Check Cleared, Transaction, and Transaction Description.

What does the “Account Tab” do? This allows you to manage your accounts. Here you can reorder and customize which accounts will show up on the “Dashboard”. You can even hide accounts from view. To give your account nicknames and change how they appear throughout the online banking system, click on the pencil to the right of the account, type in a new name, and if you would like, chose a new account color. Click “Save” to apply the change(s). To change the order in which the accounts are displayed, click “Reorder Accounts”, and then drag your accounts in the desired order. Click “Save Order” to save.

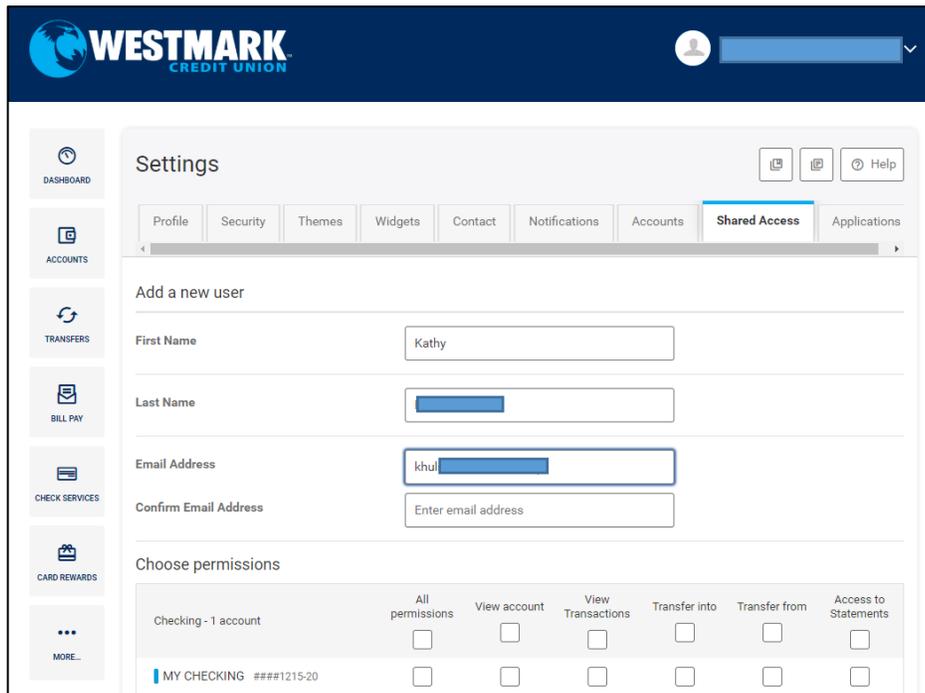
What does the “Application Tab” do? This allows you to pull up loan application documents and start the application process.

## Shared Access Tab:

This will allow you to grant others access to view your accounts and make any transactions they are given permission to. Be well informed before giving someone shared access to your accounts.



To add a shared user, click add user and put in the other parties information as seen below:

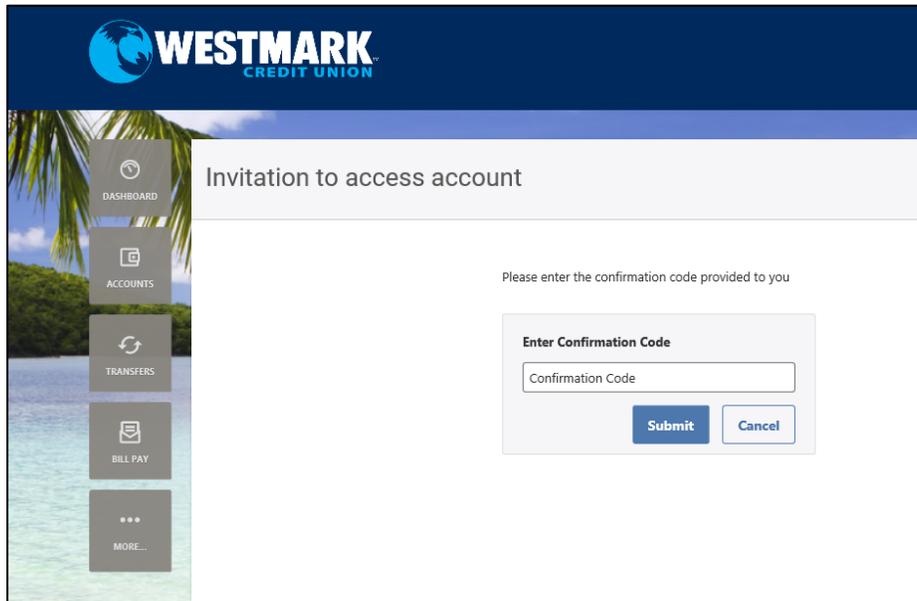


You'll then need to determine the permissions you would like to grant this individual.

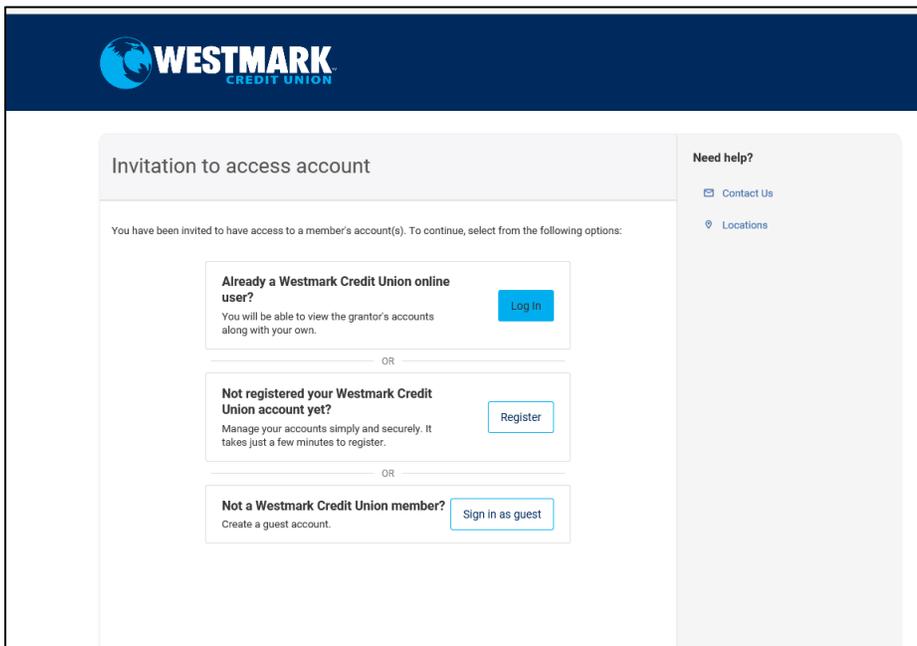
	All permissions	View account	View Transactions	Transfer into	Transfer from	Access to Statements
Checking - 1 account	<input type="checkbox"/>					
MY CHECKING ###1215-20	<input type="checkbox"/>					
Savings - 2 accounts	<input type="checkbox"/>					
MY SAVINGS ACCT ###1215-00	<input type="checkbox"/>					
SECOND SAVINGS ###1215-01	<input type="checkbox"/>					
Loans - 2 accounts	<input type="checkbox"/>					
2020 SUBARU CROS... ###1215-01	<input type="checkbox"/>					
2018 JEEP WRANGL... ###1215-50	<input type="checkbox"/>					
Credit Cards - 1 account	<input type="checkbox"/>					
VISA HOME EQUITY ###1215-06	<input type="checkbox"/>					
Mortgages - 1 account	<input type="checkbox"/>					
FIRST MORTGAGE ###1215-69	<input type="checkbox"/>					

Now you'll need to confirm and invite the user. Once you hit confirm, you will need to give the individual the access code that appears on your screen. The individual will not receive the code in their email and can't complete the shared access set-up without it.

The individual you are granting access to will receive an email inviting them to access the accounts with the code given to them by the member granting them access.



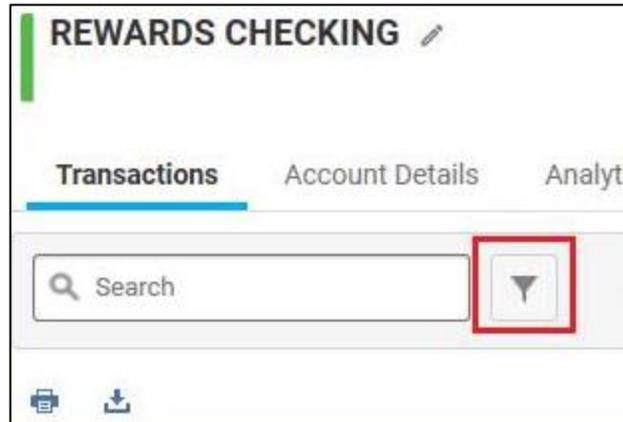
Once they've entered the code, they will need to login either with their Westmark account or as a guest.



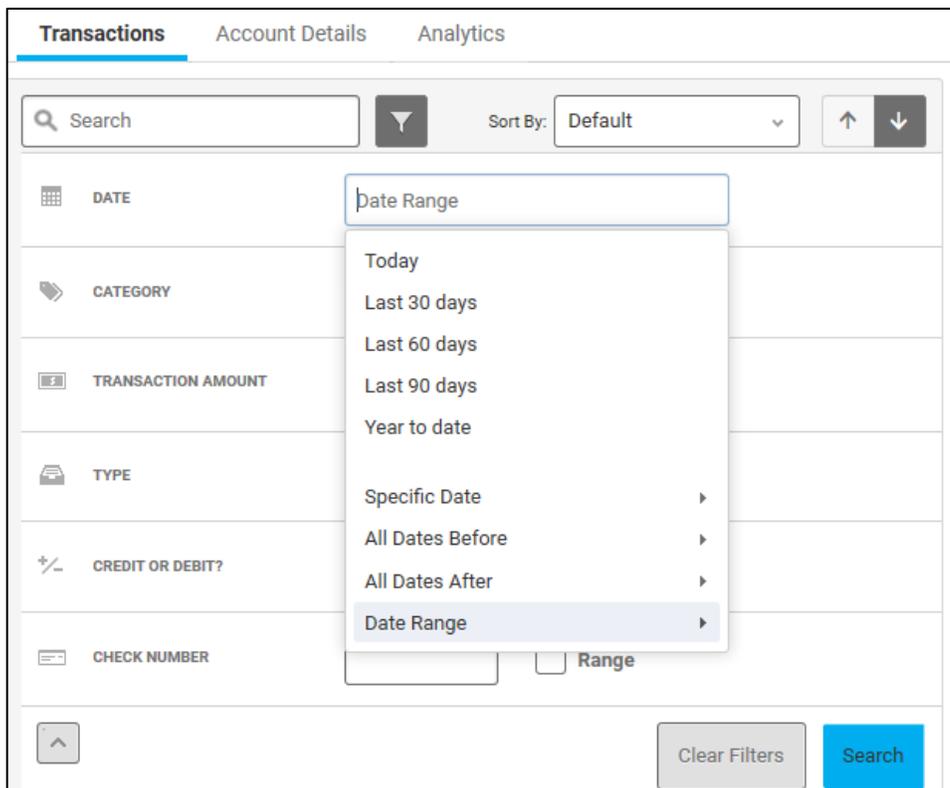
**\*Shared access can only be completed in the desktop version.**

## How to Export History from Online Banking:

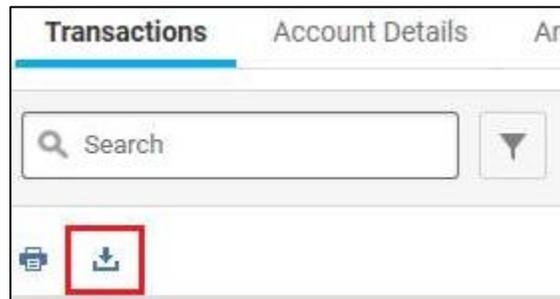
1. Click on the account you want to export history from
2. Right next to the search bar, there is a “filter” button. Click it.



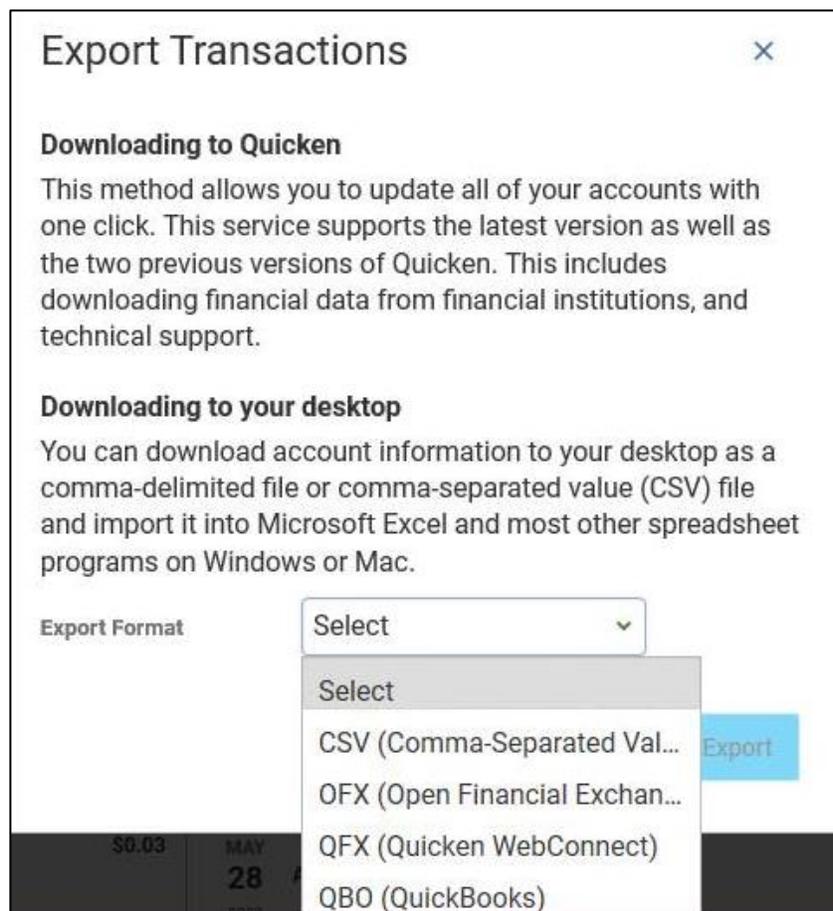
3. Click on the “Date Range” text box next to Date.
4. Select the date range of history you want. If you want specific dates, choose the bottom option “Date Range”.



5. Once that has been selected, click “**Search**”. That will then pull the history for your selected date range.
6. To Export that history (for the dates you just pulled) select the “**export**” button.



7. You can then select the type of export you want. It will export the history based on your selection in the filter. You save that export to somewhere on your local computer, then you can import it into your financial software, or Excel (using the CSV format).



\*\*\*NOTE: If you do not select and filter the history you want first, it will end up pulling all of your history we have stored, which is about 3 years' worth.

**If you are having issues logging in, please contact our Online Banking Support. 208-522-7009 or 1-866-522-3335 (Toll-Free)**