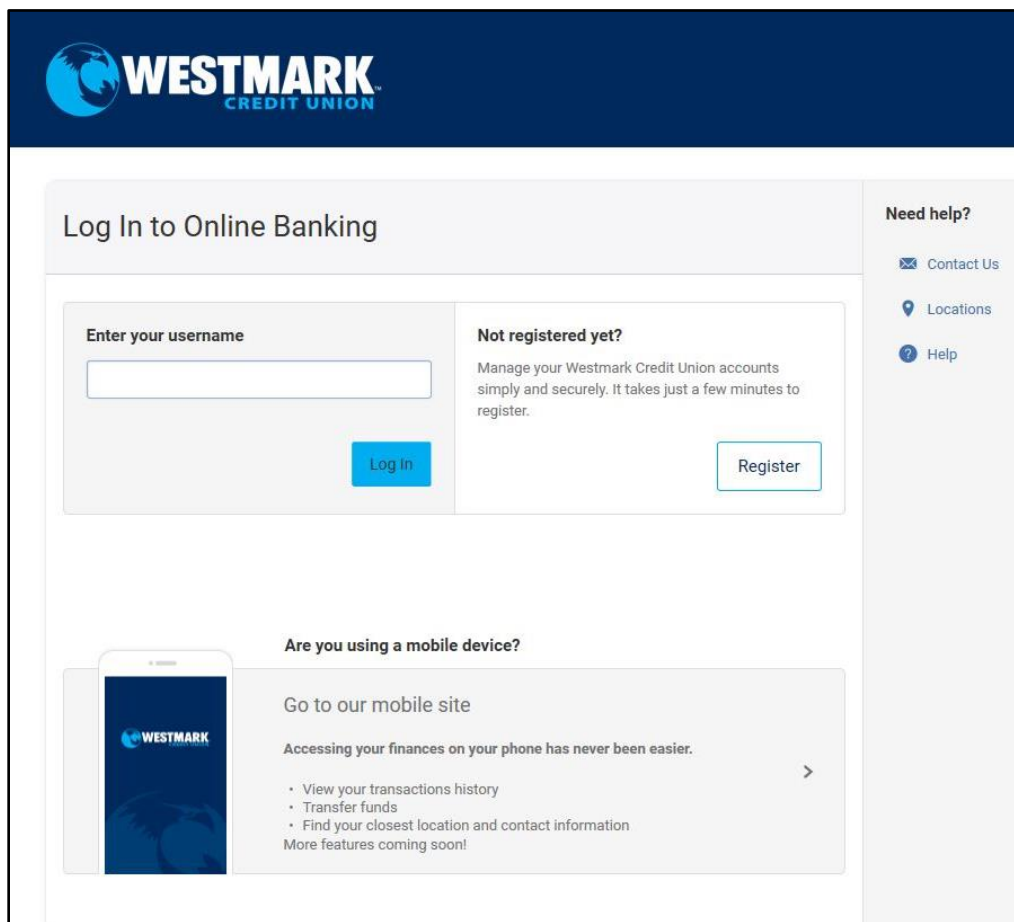




New Online Banking System Quick Guide

Go Live Date:
May 27th 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.

Log In to Online Banking

Log In

Welcome to your new online banking system!

Please click the Westmark Member Log In button below and follow the instructions to log in.

[Click Here to Retrieve Your Temporary Password](#)

After clicking this link, you will be presented with the online banking disclosure. You will be asked to accept this disclosure, verify your banking information, then you will select to have a temporary password emailed or texted to your email address or phone on file with Westmark Credit Union. Use your current online banking username and the temporary password in the email/text you received to complete the online banking log in process.

NOTE:
If you do not receive an email with your temporary password within 15 minutes, check your email spam filter, then contact Westmark Credit Union to verify they have your correct email address on file.

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!
Start banking, saving, budgeting and sharing.

Need help?

- Contact Us
- Locations

2.

Reset Your Password

Please accept the disclosure to continue the password recovery process.

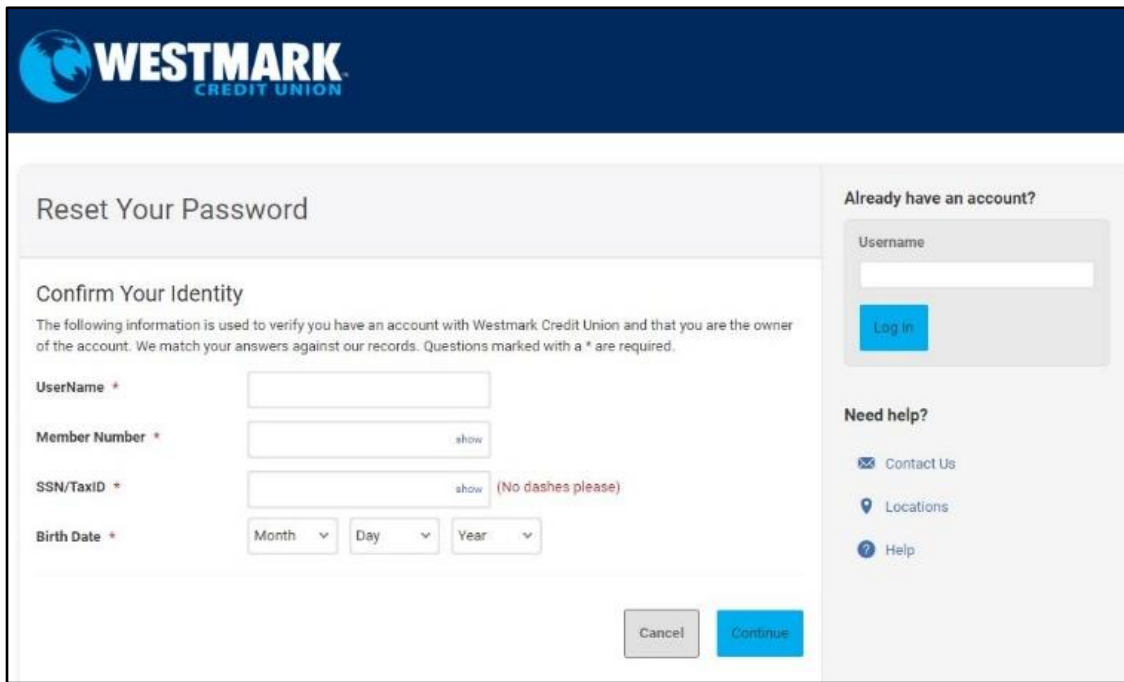
Westmark Credit Union Forgot Password Disclosure

I hereby certify that I am authorized to access Westmark Credit Union's Online Banking system, with rights and privileges to perform the transactions assigned to me as this online banking user. Unauthorized access is prohibited.

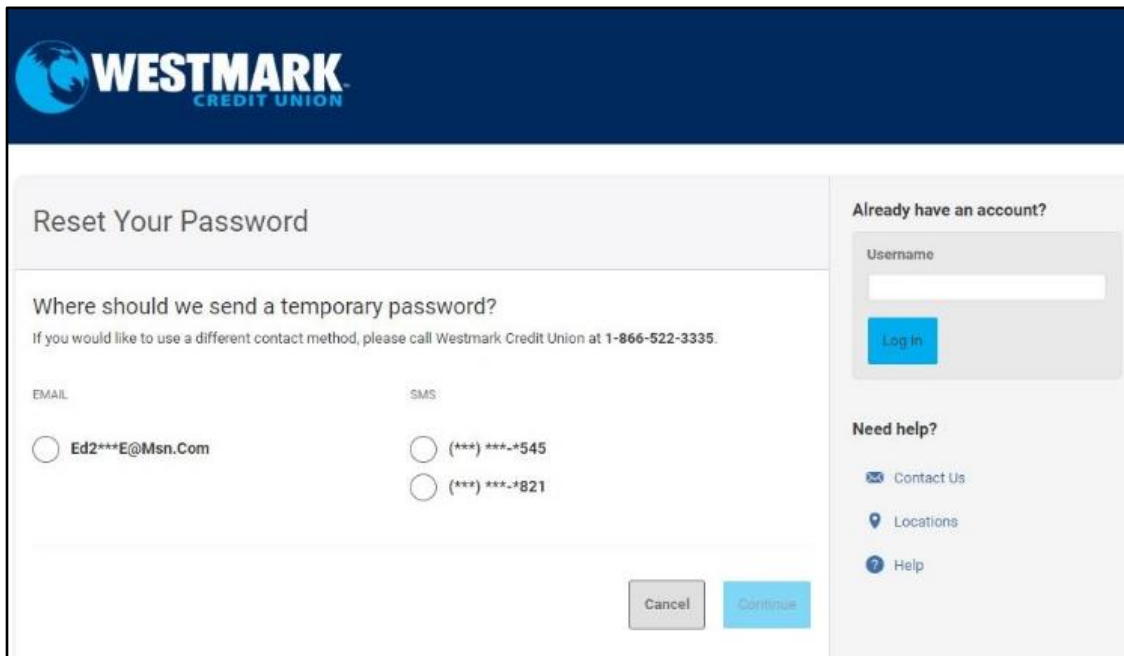
I Agree

Cancel Continue

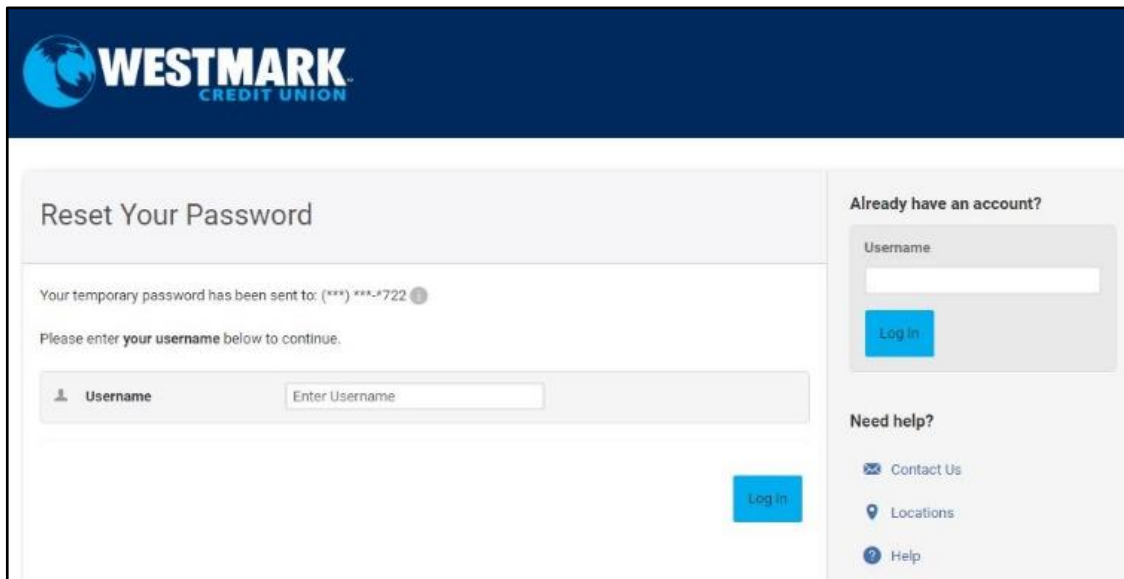
3.



4.



5.



6.

Log In to Online Banking

Need help?

[Contact Us](#)

[Locations](#)

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

7.

Log In to Online Banking

Need help?

[Contact Us](#)

[Locations](#)

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

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 Westmark Credit Union registration interface. The main heading is "Register for Online Banking Access". On the left, there are two input sections: "Username" and "Password". The "Username" section has a text input field containing "TestAcct" and a "Check Availability" button. The "Password" section has a heading "We will generate a temporary password for you. Where should we send it?" and a "SMS" sub-heading. Below this are four radio button options: "(***)***_*111" (selected), "(***)***_*222", "(***)***_*333", and "Other". At the bottom right of the main form area are "Cancel" and "Continue" buttons. On the right side of the page is an "Application Process" sidebar with a vertical progress indicator. The steps are: "Confirm Your Identity" (completed), "Register" (current step), "Authenticate", "Confirm Contact Information", and "Done". Below the sidebar is a "Need help?" section with a "Contact Us" link.

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

This screenshot shows the next step in the registration process. The heading is "Register for Online Banking Access" and the sub-heading is "Temporary Password". Below the heading is a text area with instructions: "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." and "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." Below the text is a "Password" label and a text input field. A "Reset Password" link is located below the input field. At the bottom right is a "Log In" button. The "Application Process" sidebar on the right is identical to the previous screenshot, with "Authenticate" now being the current step. The "Need help?" section is also present.

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. At the top, the Westmark logo is on the left, and the user's name "JOE MEMBER BUSINESS TEST INC" is on the right. The dashboard is divided into several sections:

- Accounts:** A table showing account balances for Checking, Savings, and Loans.
- Credit Score:** A widget showing an average credit score of 687 with options to track, monitor, and find better loan options.
- Financial Resources & Education:** A section with a tutorial titled "Introduction to Individual Retirement Acco..." and a date of 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 "Westmark Website", "Apply for a Loan", and "Lost or Stolen Card".

Account Type	Account Name	Account Number	Balance
Checking	REGULAR CHECKING A...	****1120	\$15,000.00
	VISA HOME EQUITY	****1128	\$0.00
	Total: \$15,000.00		
Savings	PRIMARY SAVINGS ACCT	****1100	\$22,804.90
	SECOND SAVINGS ACCT	****1102	\$100.00
Total: \$22,904.90			
Loans	ADVANCE LINE	****1100	\$0.00
	ADVANCE LINE	****1101	\$0.00
	PERSONAL LOC	****1102	\$0.00
Total: \$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: ****112D, \$15,000.00
- Prime 55: ****112B, \$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 filter icon, and a "Sort By: Default" dropdown menu.

The transaction history table is as follows:

DATE	DESCRIPTION	DEBITS	CREDITS	BALANCE
AUG 1 2019	From Share ****029-00 ##FS00 Add a category		\$20.00	\$100.00
AUG 1 2019	From Share ****029-00 ##FS00 Add a category		\$20.00	\$80.00
AUG 1 2019	From Share ****029-00 ##FS00 Add a category		\$20.00	\$60.00
AUG 1 2019	From Share ****029-00 ##FS00 Add a category		\$20.00	\$40.00
AUG 1 2019	From Share ****029-00 ##FS00 Add a category		\$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 SAVINGS ACCT (\$22,859.90). The 'To' column lists accounts like Eagle Checking (\$14,830.00), Prime 55 (\$110.00), and PRIMARY SAVINGS ACCT (\$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 shows 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 'Confirm Transfer' button is highlighted.

The 'Success' dialog box displays a green checkmark and the text: Success. Your transfer of \$20.00 has been completed. Below this, it shows the transfer details: Transfer From: Eagle Checking ****1120; Transfer To: PRIMARY SAVINGS ACCT ****1100; Transfer Date: 16 OCT 2019; Frequency: One Time. The 'Make Another Transfer' button is highlighted.

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	Account	Amount
OCT 17	Eagle Checking ***1120	\$50.00
OCT 17	Prime 55 ***1128	\$20.00
OCT 17	Eagle Checking ***1120	\$20.00
OCT 17	SECOND SAVIN... ***1102	\$50.00
OCT 18	Eagle Checking ***1120	\$50.00
OCT 18	Prime 55 ***1128	\$20.00
	Eagle Checking ***1120	\$20.00
	SECOND SAVIN... ***1102	\$50.00
	Eagle Checking ***1120	\$50.00
	Prime 55 ***1128	\$50.00

Date	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 like Dashboard, Accounts, Transfers, Card Management, Bill Pay, and More. The main content area displays a calendar for October, November, and December 2019, with blue dots indicating scheduled transfers. 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:

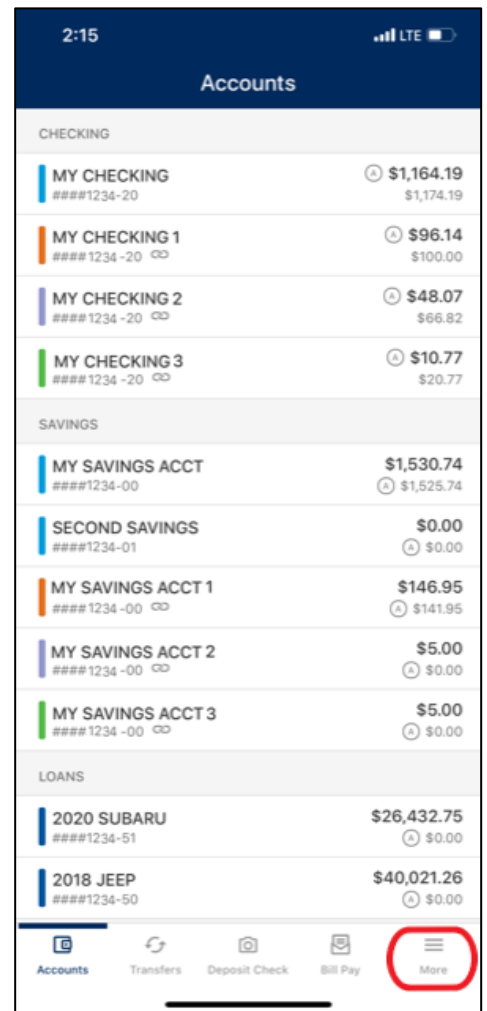
What does the “History Tab” do? This will give you a detailed transfer history.

The screenshot shows the 'History' tab in the 'Transfers' section. The interface is similar to the 'Scheduled' tab, but the main content area displays 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 1st 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.



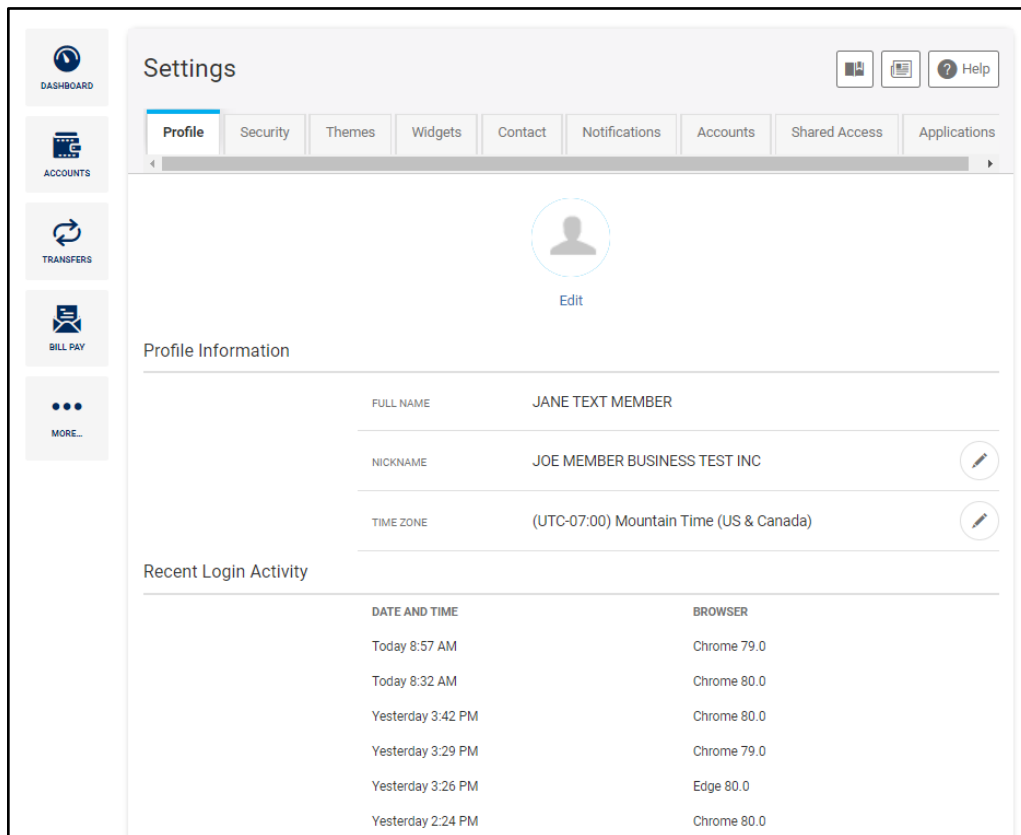
Bill Pay Widget:

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 displays the Westmark Credit Union Bill Pay interface. At the top, the Westmark Credit Union logo is on the left, and a user profile icon and a blue dropdown menu are on the right. A vertical sidebar on the left contains navigation icons for Dashboard, Accounts, Transfers, Bill Pay (highlighted), Check Services, Card Rewards, and a More... option. The main content area is titled "Bill Pay" and contains a brief introductory 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." Below this is a scrollable window titled "Westmark Credit Union BillPay" with the heading "TERMS OF SERVICE" and a sub-heading "GENERAL TERMS FOR EACH SERVICE". The text is dated "Last updated August 10, 2015". The terms are organized into sections: "1 Introduction", "2 Service Providers", and "3 Amendments". At the bottom of the scrollable area, there is a checked checkbox and the text "I Agree *". A blue "Continue" button is located at the bottom right of the scrollable area.

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.

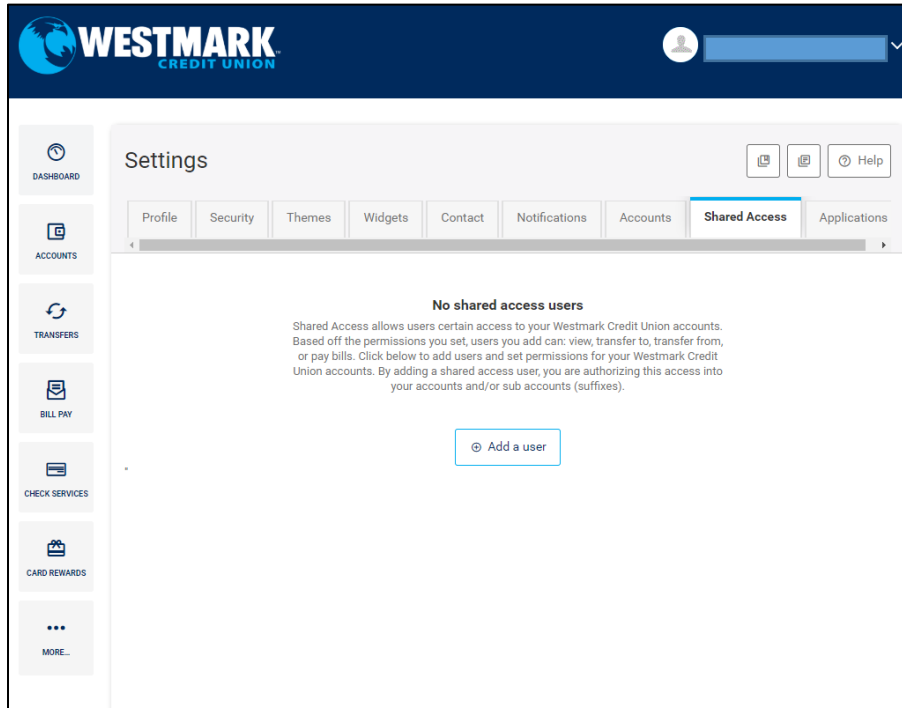
What type of notifications can be set for my Accounts? The following alerts are available as notifications for Accounts: Automatic Deposit, Automatic Withdrawal, Balance, Balance Summary, Check Cleared, Transaction, and Transaction Description.

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.

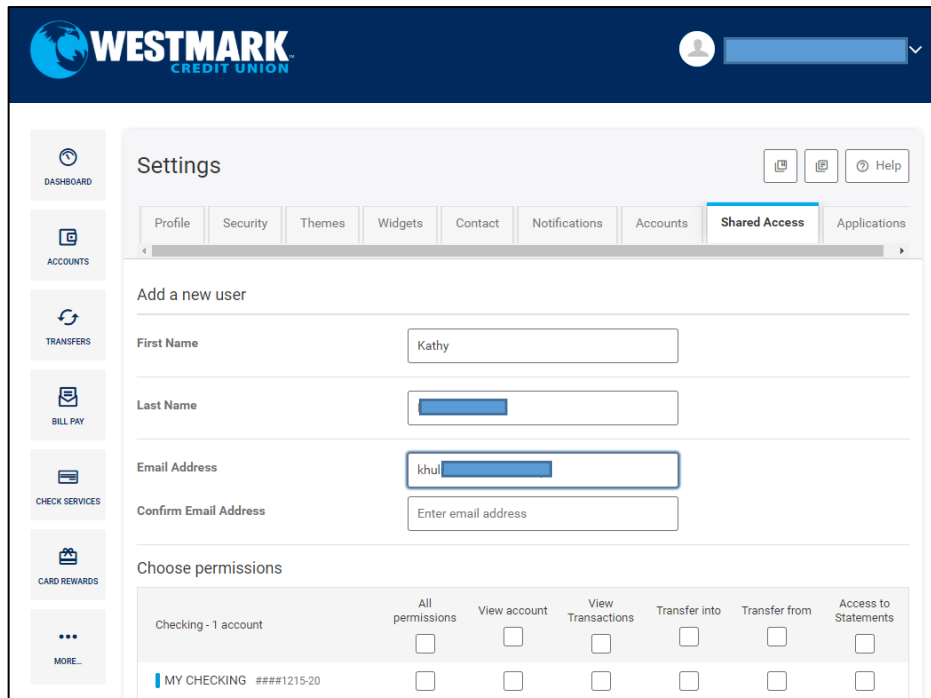
What does the “Application Tab” do? This allows you to pull up loan application documents and start the application process.

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:

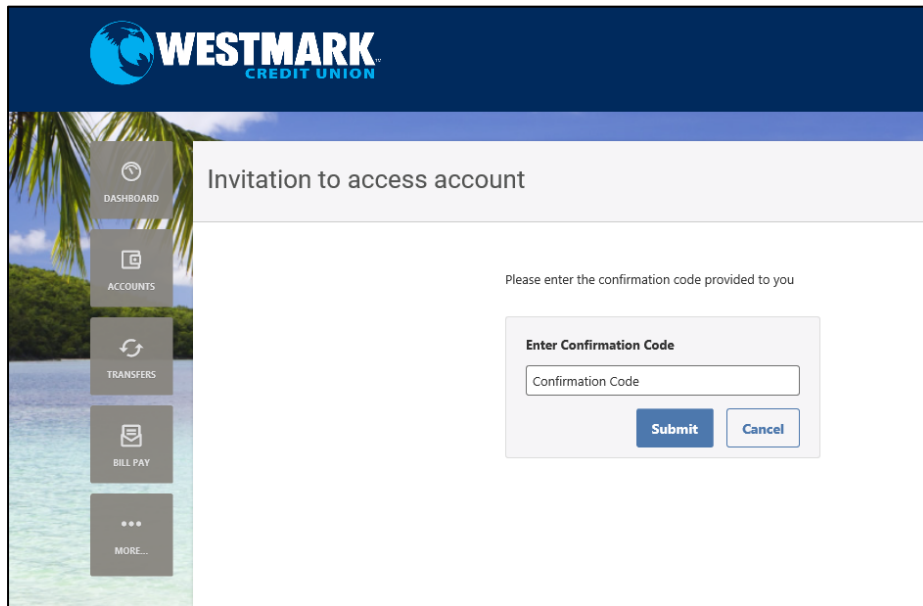


You'll then need to determine the permissions you would like to grant this individual.

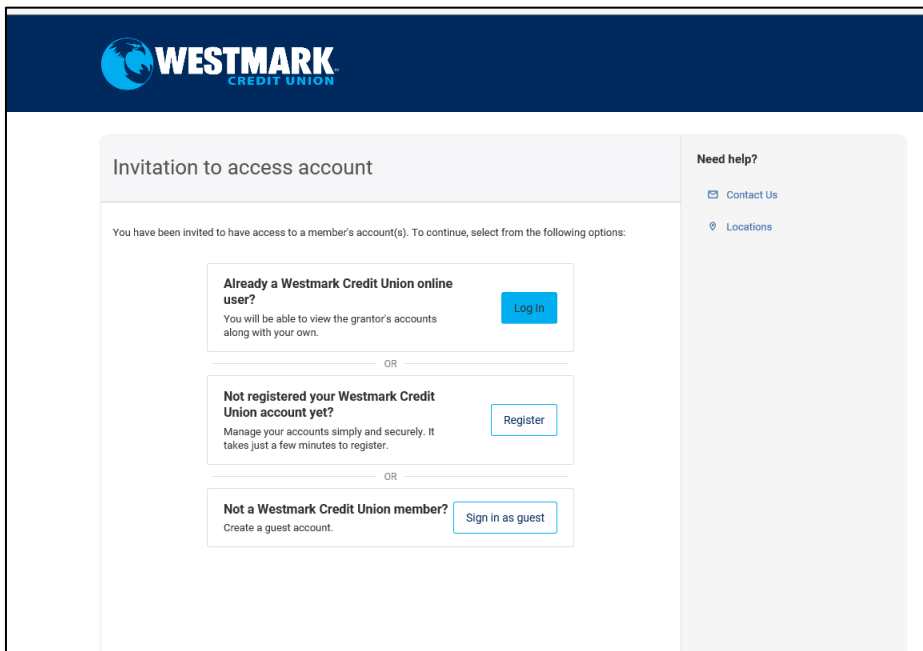
Account Type	Account Name	All permissions	View account	View Transactions	Transfer into	Transfer from	Access to Statements
Checking - 1 account	MY CHECKING ###1215-20	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>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



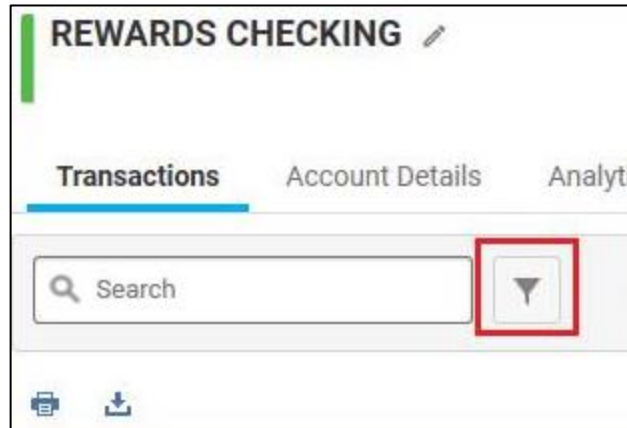
Once they've entered the code, they will need to login either with their Westmark account or as a guest.



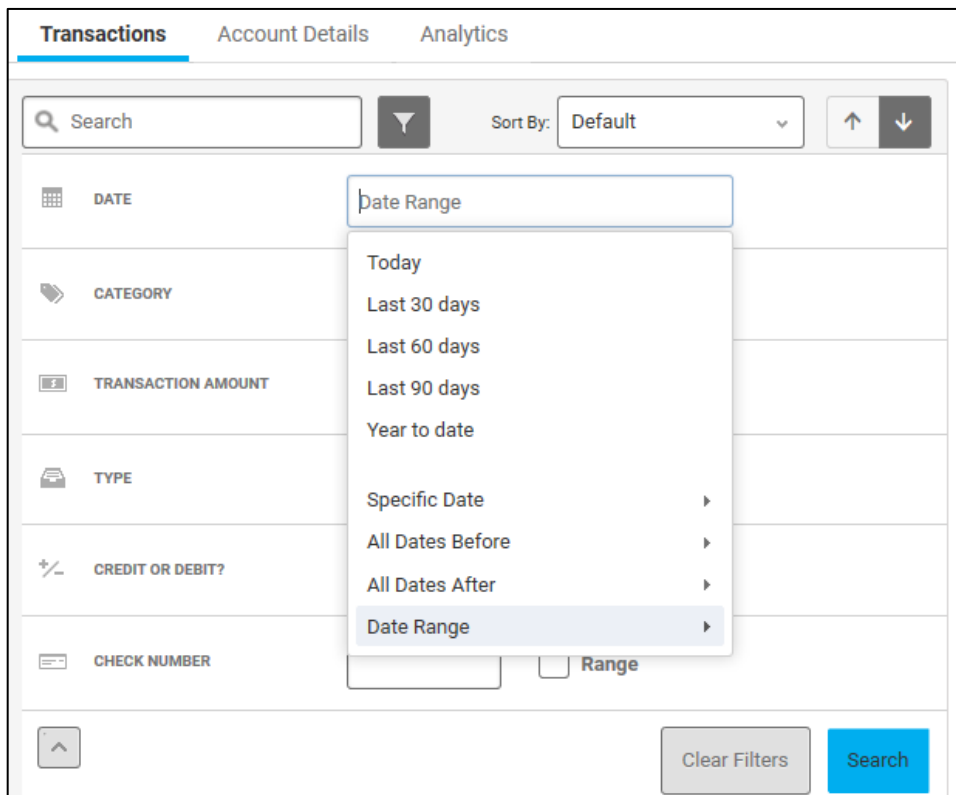
***Shared access can only be completed in the desktop version.**

How to Export History from Online Banking:

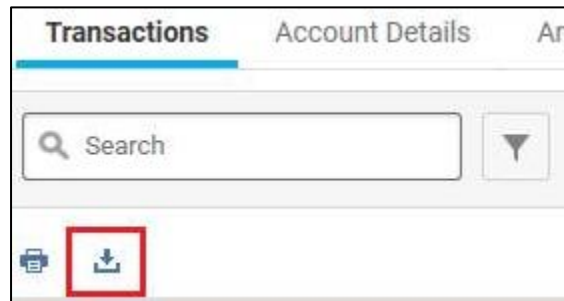
1. Click on the account you want to export history from
2. Right next to the search bar, there is a “filter” button. Click it.



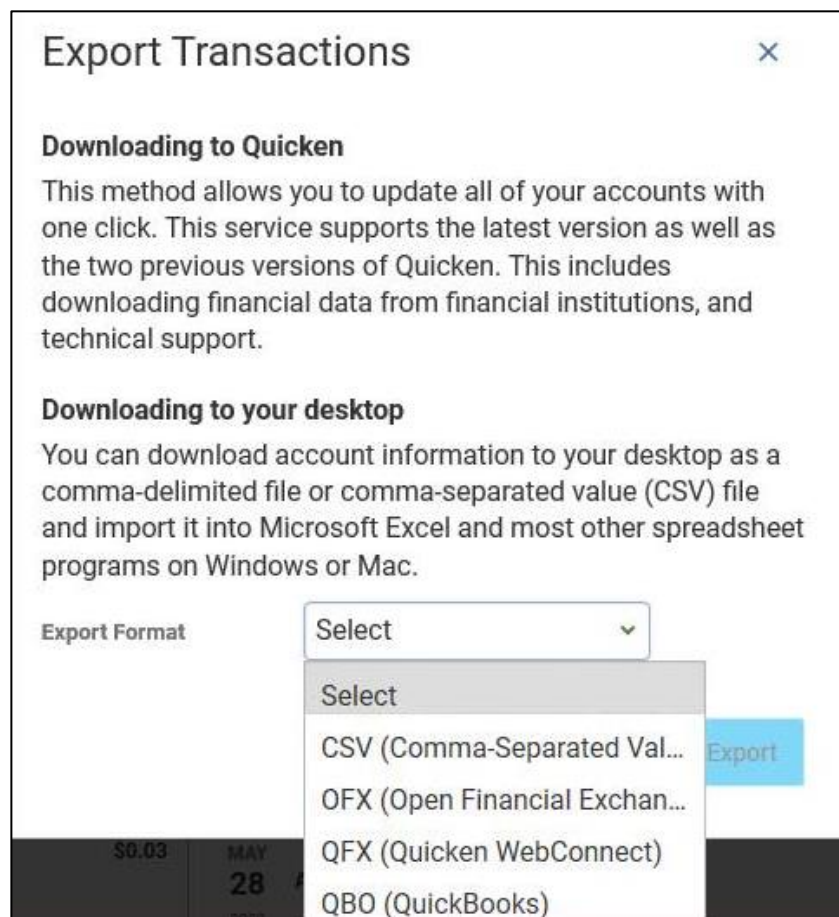
3. Click on the “Date Range” text box next to Date.
4. Select the date range of history you want. If you want specific dates, choose the bottom option “Date Range”.



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)