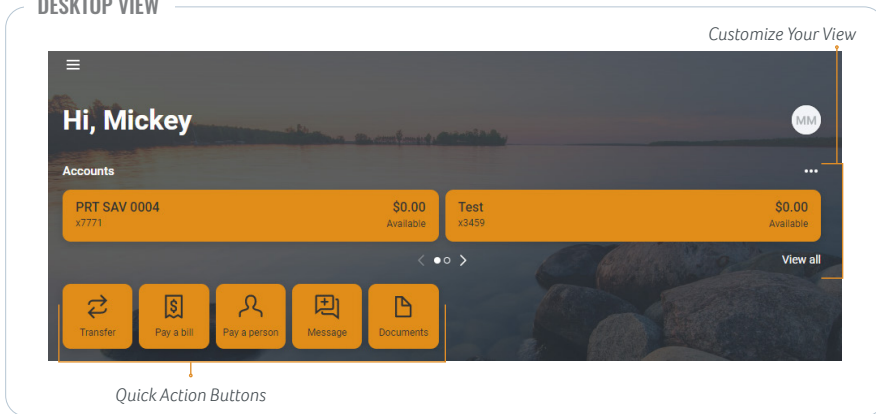


# QUICK REFERENCE GUIDE.

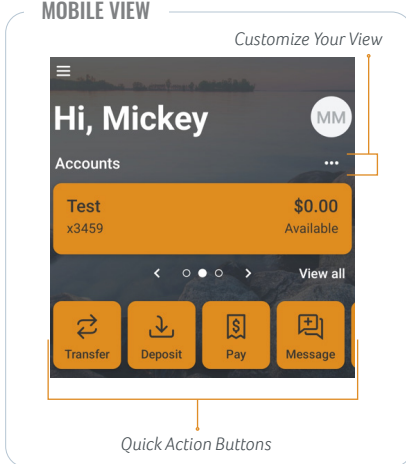
These tips apply to both online banking and the new Platinum Bank mobile app.

## DESKTOP VIEW



Quick Action Buttons

## MOBILE VIEW



Quick Action Buttons

## ACCOUNTS

View your accounts and available balances. Flip through all your accounts by swiping the Accounts section left or right.

- Use the Quick Action buttons on the Dashboard to access features like transfers, paying a bill, paying a person, message a client support person, or making a mobile deposit.
- Press the account name for additional options, such as viewing transactions, making a deposit, viewing documents (e-statements) and setting alert preferences.

## CUSTOMIZE YOUR VIEW

- Tap the “...” along the top of the screen to reorganize the dashboard layout and adjust the amount of information displayed in each section. Many of these features can also be accessed from the Menu on the left, or from the Quick Action buttons.
- Organize your dashboard to add or remove cards (menu options) and rearrange to keep your commonly used features at the top.

## MESSAGES

Start a conversation with a Platinum Bank representative during business hours. You may also leave a message after hours and we'll respond the next business day.

## BILL PAY

Pay bills, pay a person, add payees, or just get an overview of your scheduled and recently made payments.

- From your Menu, select Bill Pay > Manage Payments to access comprehensive bill pay options, including editing or deleting payees or scheduled payments, managing recurring payments, and viewing payment history.
- Choose the Quick Action Bill Pay button to quickly pay a bill or person.

## FREQUENTLY USED FEATURES

**MENU:** List of options found on the left side of your online banking screen. Depending on the screen size, and for mobile users it is found in the 3 horizontal lines in the upper left corner (hamburger icon). These options will include full functionality and historical information.

**SETTINGS:** To locate Settings on your desktop, click your name at the bottom of the Menu.

**QUICK ACTION BUTTONS:** Will bring you to commonly used features such as pay a bill, or transfer funds through a quick key.

### ADD OR REMOVE ACCOUNTS FROM DASHBOARD VIEW

Menu > Settings > Platinum Bank  
Show in App / Show balance and activity

### RENAME ACCOUNTS

Menu > Settings > Platinum Bank > Select Account > Rename

### ACCOUNT ALERTS

Choose an account from the Dashboard > Alert Preferences

### VIEWING OR ENROLLING IN ESTATEMENTS

Choose an account from the Dashboard > Estatements > Sign Up/Changes

### CHANGE USER NAME, PASSWORD, PASSCODE, FACE/TOUCH ID OR PHONE NUMBER FOR TWO FACTOR AUTHENTICATION (2FA) OR SETUP ADDITIONAL 2FA

Menu > Settings > Security

### ADD YOUR PICTURE

Menu > Settings > Profile > Click the pencil next to the round image.

### UPDATE YOUR EMAIL OR PHONE NUMBER

**DESKTOP**  
Menu > Settings > Profile  
Click edit next to the information you wish to change.

### MOBILE

Menu > Settings > Select your name  
Click edit next to the information you wish to change

### ADD A TRAVEL ALERT ON YOUR DEBIT CARD

Menu > Settings > Travel Notices > Add Travel Notice



DESKTOP VIEW

The desktop view shows a search bar at the top. Below it, the account name 'Test' and ID 'x3459' are displayed, along with a balance of '\$0.00 Available'. A 'Transactions' table lists several entries, and a 'Details' panel provides account information.

| Transaction   | Amount      |
|---|-------------|
| INTEREST RATE CHANGE<br>Feb 7                                 | \$0.00      |
| ICS TEST CLEANUP<br>Sep 21, 2021                              | \$1,150.11  |
| ANNUAL PERCENTAGE YIELD<br>Sep 16, 2021                       | +\$0.04     |
| INVESTMENT SWEEP FROM SAVINGS ACCT NO. 777771<br>Sep 15, 2021 | +\$100.00   |
| ANNUAL PERCENTAGE YIELD<br>Sep 15, 2021                       | +\$0.03     |
| TRANSFER TO SAVINGS ACCT NO. XXXX7771-S<br>Sep 14, 2021       | \$200.00    |
| ANNUAL PERCENTAGE YIELD<br>Sep 14, 2021                       | +\$0.04     |
| INVESTMENT SWEEP FROM SAVINGS ACCT NO. 777771                 | +\$1,250.00 |

**Details:**  
**Account numbers:**  
 Account number: XXXXXX  
 Routing number: 096017670  
**Account information:**  
 Owner: MICKEY MOUSE  
 Other names on account: MINNIE MOUSE  
 Date opened: 5/4/2021

TRANSACTIONS

View transactions across all your accounts from the dashboard Transactions section. To view transactions for a single account, select the Account from the dashboard.

- Search for transactions by using the magnifying glass in the upper right of the Transactions section.
- Select any posted transaction to add a tag, note, or attach an image, such as a receipt, or attach to a conversation with client support.

DETAILS

See a snapshot of your account including account number, date opened, last statement balance and your current interest rate.

MOBILE VIEW

The mobile view shows a search bar at the top. Below it, the account name 'Test' and ID 'x3459' are displayed, along with a balance of '\$0.00 Available'. A 'Transactions' list shows several entries.

|   |            |
|---|------------|
| INTEREST RATE CHANGE<br>Tuesday, February 7     | +\$0.00    |
| ICS TEST CLEANUP<br>Tuesday, September 21, 2021 | \$1,150.11 |



TRANSFERS

Move money between Platinum Bank accounts or to accounts at other financial institutions.



DEPOSIT CHECK (MOBILE APP ONLY)

Deposit a check right from your phone or tablet using the Deposit button on the Dashboard or Menu.



REMOTE DEPOSITS

Enroll in Mobile Deposit and view checks deposited through mobile deposit using the Remote Deposit button on the Menu.

