



Reference Guide: Navigating the Digital Banking Platform

Purpose

Provide an overview of the menu and features available within the new Digital Banking platform

Steps

1. The **Home** screen displays your accounts, recent activity, and any transactions requiring approval, and allows you to quickly transfer money between accounts.
2. The **Accounts** panel displays five accounts by default. Click "View all accounts" at the bottom of the panel to see additional accounts. Click the ellipses (*3 vertical dots on far right*) on any account to **view activity**, **view details** (full account and routing number), or **nickname** the account to change the displayed name.
3. The **Recent Activity** panel displays the last three days of transactions. Click filter accounts or the account name at the top of the panel to toggle between accounts.
4. Use **Move Money** panel to make a loan payment or transfer funds between accounts.
5. The **Contact Us** panel allows you to reach out to our Customer Care team with inquiries.
6. The **Transaction Approvals** panel displays any transactions that require approval.
7. Select the **Transfers and Payments** tab to make a **loan payment**, **transfer money**, send funds to other Southern Bank accounts, manage users' bill pay permissions, or make **bill payments**.
8. View **Online Activity**, including ACH, wire, transfer history, recurring transactions and mobile deposits.
9. Select the **Business Banking** tab to send **ACH transactions**, **Wires** and **Tax Payments**.
10. Select **User Management** to create new users or edit existing users.
11. Select the **Services** tab to place **stop payments**, **reorder checks**, **locate ATMs and branches**, or **access online help**.
12. Under **Settings**, set account alerts, update your password, change your login name, adjust statement delivery preferences, and manage how accounts appear on the home screen.
13. Select the **Messages** tab to view alert emails and notifications regarding your accounts.
14. Select the **Documents** tab to view **eStatements** or retrieve **tax forms**.
15. Select Log Off when you're done with your online banking session.

If you have any questions, contact our Customer Care Center:

1-855-275-7226 opt 3

Email: customercare@southernbank.com