

Online Banking Client Checklist

Enhanced Online Banking

Peoples Security Bank & Trust would like to welcome you to our enhanced Online Banking platform. To help familiarize yourself with the system, we would like to provide you with some helpful information. For more detailed information, please visit www.psbtc.com.

Please take a moment to review the checklists for commercial and consumer clients.

Commercial Clients

- Verify that all your accounts are displaying on the home page
- Click on all accounts to ensure the history is showing along with any associated transaction/check images
- Verify that you can view your account statements
- Reoccurring transfers between accounts will need to be reestablished
- Verify that all your ACH & Wire templates transferred over correctly if applicable
- **Very Important-** All reoccurring Wire or ACH Transactions will need to be reestablished
- If you are a QuickBooks user, you will need to deactivate/reactivate your online banking connection
- We have replaced the need for Token devices and replaced it with newer "out of band technology" utilizing Secure Access Codes ~ SAC codes. Visit our website for more information
- Check out a few of the new commercial features:
 - **Payee based Payments platform – you can now add payees to your payee list and use that information for Wires or ACH without having to input every time. You can also set up email notifications for your payees every time you initiate a payment to them. Located in the Payments menu.**
 - **Are you an approver for Wire and ACH Transactions? Set up your specific approval notifications. Located in the Settings menu.**
 - **Make PA, NY, and NJ tax payments in ACH. Located in the Commercial Tab under Tax Payments.**

These are just a few of the new and exciting features the system has to offer. We encourage you to log in and look around.

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Consumer Clients

- Verify that all your accounts are displaying on the home page
- Click on all accounts to ensure the history is showing along with any associated transaction/check images
- Verify that you can view your account statements
- Reoccurring transfers between accounts will need to be reestablished
- Any account alerts you had established will need to be reestablished
- If you are a mobile user, please go to your device specific app store and download the "NEW" mobile application
- If you are a Quicken user, you will need to deactivate/reactivate your online banking connection
- If you are a Bill Pay user, please verify that you can access bill pay. Note: there were no changes to the Bill Pay provider so there were no changes with your payees or schedules.
- Check out a few of the new consumer features:
 - **Send money easily to other account holders using our new feature. Located in the transaction menu.**
 - **Take control of your finances with our new "Financial Tools" feature where you can also link accounts from other banks. Located at the top of the home page.**

These are just a few of the new and exciting features the system has to offer. We encourage you to log in and look around.